Maximizer CRM Enterprise Edition

Innovative and sophisticated CRM for medium to large organisations

Today's demanding medium to large-sized businesses are challenged with competing in a fierce market against tough counterparts. Having more sophisticated processes and automation is critical in empowering teams to collaborate efficiency, allowing them to create the kind of customer loyalty you need for sustained growth.

If your team needs access to CRM information from anywhere, and you need to monitor all the critical activities in your business in real-time – with a low total cost of ownership that fits in your budget – Maximizer CRM Enterprise Edition is for you.

Maximizer CRM Enterprise Edition gives your staff access via Windows® desktop, web browser and mobile device. Also powered by Microsoft SQL Server for enterprise-class database management, security, and reporting, Enterprise Edition includes a Lite Edition of Workflow Automation powered by KnowledgeSync, enabling you to automate customer-facing processes and monitor critical activities in your business – before it's too late.

Maximizer CRM Enterprise Edition features:

- Account & Contact Management including time management, task management, email management, communications & Office integration, Outlook® & Exchange®

synchronisation[1] document management

- Sales: including sales force automation, opportunity management, lead management, sales forecasting, territory management, quote management, Partner Relationship Management[2]

- Marketing: including marketing automation, email marketing, full campaign manager and HubSpot integration[3]

- Customer Service & Support: including case management, customer self-service[3], Knowledge Base, and computer telephony integration (CTI)

- Business intelligence: including reports via Crystal reports[4] and SQL Server Reporting Services (SSRS), and customisable real-time dashboards

- Automation: automate basic tasks in all modules with the ability to add-on extra automations if neccessary with Workflow Automation[5]

- Customisation & integration: tailor your system, simply and easily to make CRM work for your unique business processes.

- Social media management: Build social profiles, link automatically to

Key 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
- HubSpot integration.

LinkedIn companies and individuals and harness the power of this abundant resource.[6]

1. Exchange synchronisation requires MaxSync add-on product with additional fees.
2. Partner relationship management requires add-on Partner Web Access licences.
3. HubSpot integration requires Maximizer CRM: HubSpot Connector at additional cost.
4. Customer self-service requires add-on Customer Web Access licences.
5. Custom reporting provided through add-on licences of Crystal Reports.
6. Requires LinkedIn premium subscription.
*. Workflow Automation powered by KnowledgeSync is an add-on product with additional licence fees.

Maximizer™
Simply Successful **CRM**

Access your CRM system via almost any mobile device and benefit from comprehesive CRM functionality on the move.

Maximizer CRM Enterprise Edition provides true real-time collaboration and business intelligence for the most demanding of growing, medium-sized businesses.
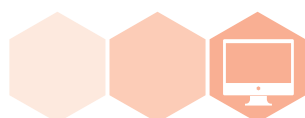
Compare Maximizer CRM Editions

Deployment options	On-premise			Cloud based
User features	Entrepreneur Edition	Group Edition	Enterprise Edition	Partner Hosted[7]
General — 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
Minimum # of users	1	1	1	1
Maximum # of users	5	10	Unlimited	Unlimited
Software Assurance[8]	Included	Included	Included	Included
Access options — Windows desktop access	✔	✔	✔	
Web access		✔	✔	✔
Mobile access for smartphones (including iPhone®, Android®, Samsung® and BlackBerry®)		✔	✔	✔
Mobile access for tablets (including iPad®, Android®, Samsung® and Blackberry® Playbook)		✔	✔	✔
MaxMobile CRM for BlackBerry	Add-on	✔	✔	
Offline access (remote synchronisation)			✔	
Sales — Sales automation	Basic	Standard	Advanced[9]	✔
Sales forecasting	✔	✔	✔	✔
Sales executive dashboard		✔	✔	✔
Sales funnel reports		✔	✔	✔
Lead management and routing		✔	✔	✔
Opportunity management	Basic	Team and Individual	Team and Individual	✔

7. Included features and abilities may change depending on partner
8. Software Assurance included for one full year. Renewal fee after one year at 20% of licence MSRP.
9. Advanced Sales automation features include Territory Management and advanced Workflow events

Deployment options	On-premise			Cloud based
User features	Entrepreneur Edition	Group Edition	Enterprise Edition	Partner Hosted[7]
Sales — Opportunity monitoring (alerts)*		✔	✔	✔
Sales action plan (project management)	✔	✔	✔	✔
Territory management			✔	✔
Sales quota management			✔	✔
Sales strategies & process methodology		✔	✔	✔
Interactive organisational charts	✔	✔	✔	
Quote management		✔	✔	
Real-time alerts including lead status alerts, changed forecast, won/lost deals*		Add-on	Add-on	
Partner relationship management (Partner Web Portal)		Add-on	Add-on	
Marketing — HubSpot integration[3]		Add-on	Add-on	Add-on
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			✔	✔

Maximizer™ CRM
Simply Successful

Build your own custom key performance indicators with Maximizer CRM dashboards, to gain instant insight into what matters to your business.
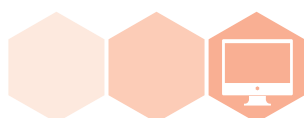
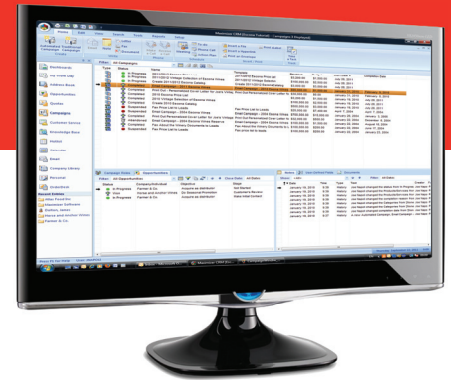| Deployment options		On-premise		Cloud based
User features	Entrepreneur Edition	Group Edition	Enterprise Edition	Partner Hosted[7]
Marketing — Email campaign metrics (total sent, received, opened, etc.)		✔	✔	✔
Email monitoring and automated replies*		Add-on	Add-on	
Real-time alerts, including lead status alerts, suspended and late campaigns		Add-on	Add-on	
System monitoring of user unsubscribes*		Add-on	Add-on	
Customer Service and support — Customer service case management (routing, queuing, agent workloads, alerts)		Standard[10]	Advanced	✔
Customer service cases, billing, queue reports		✔	✔	✔
Customer service executive dashboard		✔	✔	✔
Automatic case creation via incoming email		✔	✔	✔
Service billing		✔	✔	✔
Automated case monitoring and alerts		✔	✔	✔
Knowledge base for storing common cases and resolutions		✔	✔	✔
Real-time alerts (out-of-the-box) include case overload, overdue cases, and status changes *		Add-on	Add-on	
Advanced monitoring and automatic replies*		Add-on	Add-on	
Customer self-service web portal		Add-on	Add-on	

7. Included features and abilities may change depending on partner.
10. Advanced Customer Service & Support Management module includes advanced Workflow events

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

Monitor opportunities and sales metrics to effectively manage and trigger next steps seamlessly.

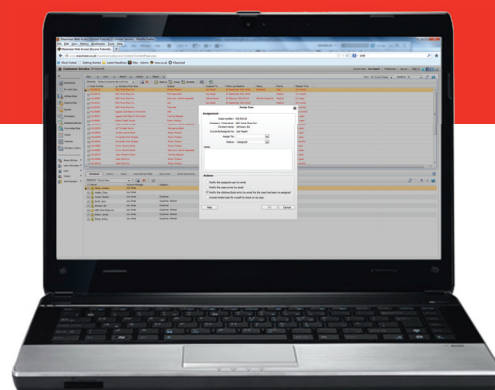| Deployment options	On-premise			Cloud based
User features	Entrepreneur Edition	Group Edition	Enterprise Edition	Partner Hosted[7]
Business productivity Customer timeline (at a glance history of all communications)		✔	✔	✔
Email, letter, fax templates with merge fields	✔	✔	✔	✔
Customisable mandatory fields	✔	✔	✔	✔
Unlimited column views (column setups)	✔	✔	✔	✔
Efficient selection of individual or teams' customisation settings (saved searches, column setups, favourite lists)	✔	✔	✔	✔
Photos for accounts and users	✔	✔	✔	✔
Social media integrations through hyperlink documents and LinkedIn[6]	✔	✔	✔	✔
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	✔	✔	✔	✔
Customisable home page (My work day)	✔	✔	✔	✔
Data import/export (CSV, XLS and other standard formats)	✔	Simplified import from MS Outlook	Simplified import from MS Outlook	Simplified import from MS Outlook
CTI (Computer Telephony Integration)	✔	✔	✔	✔

6. Requires LinkedIn premium subscription.
7. Included features and abilities may change depending on partner

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Inspire ferocious customer loyalty by effortlessly tracking, escalating, resolving and reassigning support cases to provide a pre-eminent customer experience.
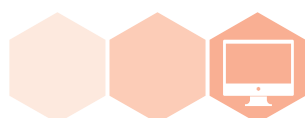
Deployment options	On-premise			Cloud based
User features	Entrepreneur Edition	Group Edition	Enterprise Edition	Partner Hosted[7]
BI — Built in and customisable dashboards		✔	✔	✔
Crystal Reports	✔	✔	✔	
SQL reports (SSRS)		✔	✔	
Web reports		✔	✔	✔
Administration — Customisation suite		Add-on	✔	
Meta data customisations	✔	✔	✔	✔
Full and read-only access settings		✔	✔	
Field-level security	✔	✔	✔	✔
Two-level security support for email templates				
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
MS — MS Outlook	✔	✔	Advanced[11]	Advanced
MS Word	✔	✔	✔	✔
MS Excel	✔	✔	✔	✔
MS Sharepoint[12]		✔	✔	
MS Exchange server (MaxSync)		Add-on	Add-on	

About Maximizer Software

Maximizer Software delivers Customer Relationship Management (CRM) software and professional services to meet the needs, budgets and access requirements of entrepreneurs, small and medium businesses and divisions of large enterprises.

Simple, easy to use and affordable, Maximizer CRM enables companies to mobilise their workforces through all-access web, smart phone, tablet and desktop delivery methods.

Easily configurable for organisations in any industry, Maximizer CRM optimises sales processes, enhances marketing initiatives and improves customer service to ultimately boost productivity and revenue.

With headquarters in Canada and offices and business partners worldwide, Maximizer Software has sold over one million licences to more than 120,000 customers since 1987.

Technology Partners

Powered by Windows Azure | Microsoft GOLD CERTIFIED Partner | SAP BusinessObjects | BlackBerry Alliance Member | Bell | Vineyardsoft

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Maximizer CRM

Maximizer CRM helps small and medium-sized businesses maximize their marketing, sales, customer satisfaction capabilities and enhance their productivity and efficiency through the optimisation of what resources they have.

Why Maximizer CRM?

- Simple & quick to deploy, use and maintain
- Flexible access options through web, desktop and mobile devices
- Value for money with low total cost of ownership and monthly subscription models
- Expertise as a leader in pioneering CRM development, with more than 20 years experience.

Visit www.max.co.uk for:

- A test drive of the latest release
- Information on how CRM can support your role
- Tools and eBooks
- Resources and information on Cloud based CRM
- An overview of technology and features
- Online demos and features
- White papers and webinars on CRM best practices.

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