



Compare Versions with Maximizer CRM 2015

Group and Enterprise Editions

Maximizer CRM 2015 is the fully-featured flexible solution, providing Sales Force Marketing and Workflow Automation, in addition to Customer Service Case Management that is designed to support your company's need for growth and success.

The latest generation of Maximizer: **Maximizer CRM 2015** makes it easier to access information from all web enabled devices such as smartphones and tablets, more integrative features with Microsoft Office® applications and overall access and usability improvements through world class data centres, penetration tested for outstanding reliability and data security.

The chart below provides a comprehensive comparison of new and/or enhanced features and capabilities of the Maximizer CRM 2015 release with previous versions of Maximizer.

Mobile Access

| User Features | Maximizer CRM 2015 | Maximizer CRM 12 | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|---|--------------------|------------------|------------------|-----------------------|
| Mobile access for tablets (iPad®, Android Tablets®, Blackberry® and many more) | ✓ | ✓ | | |
| Mobile access for smartphones (iPhone®, Android®, Blackberry and many more) | ✓ | ✓ | | |
| Automatic login option for quicker access | ✓ | ✓ | | |
| Quick search | ✓ | ✓ | | |
| Additional search options (by cases, by city, by country/state and by postcode/zip) | ✓ | ✓ | | |
| Customisable column views (for tablets) | ✓ | ✓ | | |
| Open and share documents | ✓ | ✓ | | |
| Create shortcut on device homescreen | ✓ | ✓ | | |
| Shortcut to email/call-in list view (for smartphones) | ✓ | ✓ | | |
| Multi-user appointments | ✓ | ✓ | | |
| Manage key fields | ✓ | ✓ | | |
| Send emails | ✓ | ✓ | | |
| Manage appointments | ✓ | ✓ | | |
| Mobile dashboards | ✓ | ✓ | | |

Sales

| User Features | Maximizer CRM 2015 | Maximizer CRM 12 | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|---|------------------------------|------------------|------------------|-----------------------|
| Opportunities details tab | ✓ | | | |
| Define mandatory fields in opportunities using logic and rules | ✓ | | | |
| Rolling date range in hotlist | ✓ | | | |
| Unfinished appointments carry forward in hotlist | ✓ | | | |
| Voice over Internet Protocol (VoIP) integration | ✓ Call via Skype directly | | | |
| Social media web search | ✓ | | | |
| Opportunities following tab in address book and hotlist modules | ✓ | ✓ | | |
| Better linkage between contacts and associated account manager | ✓ | ✓ | | |
| Web lead capture | ✓ | ✓ | | |
| Set relationships between accounts (related entries) | ✓ | ✓ | | |
| Capture campaign sources for leads and opportunities | ✓ | ✓ | | |
| Sales quota management | ✓ | ✓ | ✓ | |
| Email merge fields | ✓ | ✓ | ✓ | |
| Email merge templates | ✓ | ✓ | ✓ | |
| Sales opportunity monitoring | ✓ | ✓ | ✓ | |

Marketing

| User Features | Maximizer CRM 2015 | Maximizer CRM 12 | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|---|--|------------------|------------------|-----------------------|
| Anti-spam functionality | ✓ | | | |
| HTML text editor | ✓ Enhanced (tables, HTML code, bullets, indentations) | | | |
| Enhanced email unsubscribe functionality | ✓ | | | |
| Web form from email preference management | ✓ | | | |

Marketing (continued)

| User Features | Maximizer CRM 2015 | Maximizer CRM 12 | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|---|--------------------|------------------|------------------|-----------------------|
| Notes and emails text editor | ✓ | | | |
| Pre-built email and campaign templates | ✓ | | | |
| Social media web search | ✓ | | | |
| Integration with HubSpot | ✓ | ✓ | | |
| Web lead capture | ✓ | ✓ | | |
| Campaigns Return On Investment (ROI) management | ✓ | ✓ | | |
| Automated campaign templates | ✓ | ✓ | | |
| Campaign response metrics | ✓ | ✓ | ✓ | ✓ |
| Built-In marketing reports | ✓ | ✓ | ✓ | |
| Campaign manager web access | ✓ | ✓ | ✓ | |

Service

| User Features | Maximizer CRM 2015 | Maximizer CRM 12 | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|--|--------------------|------------------|------------------|-----------------------|
| Pre-defined subjects included in Search Dialog | ✓ | ✓ | | |
| Customer service following tab in address book and hotlist modules | ✓ | ✓ | | |
| Web links to knowledge base articles | ✓ | ✓ | | |
| Notifications | ✓ | ✓ | ✓ | ✓ |
| Email merge fields | ✓ | ✓ | ✓ | ✓ |

Business productivity

| User Features | Maximizer CRM 2015 | Maximizer CRM 12 | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|---|--------------------|------------------|------------------|-----------------------|
| Anti-spam functionality | ✓ | | | |
| HTML editor for creating campaign messaging | ✓ | | | |
| Enhanced email unsubscribe functionality | ✓ | | | |
| Web form from email preference management | ✓ | | | |
| Notes and emails text editor | ✓ | | | |
| Pre-built email and campaign templates | ✓ | | | |

Business productivity (continued)

| User Features | Maximizer CRM 2015 | Maximizer CRM 12 | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|---|------------------------------|------------------|------------------|-----------------------|
| Rolling date range in hotlist | ✓ | | | |
| Unfinished appointments carry forward in hotlist | ✓ | | | |
| Email documents from within the documents tab | ✓ | | | |
| All contacts retrieval | ✓ | | | |
| All companies/individuals retrieval | ✓ | | | |
| Voice over Internet Protocol (VOIP) integration | ✓ Call via Skype directly | | | |
| In-product "help" videos (Hotlists, email, notes and documents, global editing user management) | ✓ | | | |
| Social media web search | ✓ | | | |
| Address book interface for improved performance and usability | ✓ | ✓ | | |
| Ability to define mandatory fields in address book entries using logic and rules | ✓ | ✓ | | |
| User-defined fields support clickable hyperlinks | ✓ | ✓ | | |
| One click to map from contact address | ✓ | ✓ | | |
| Quick access for frequently used saved searches and favourite lists | ✓ | ✓ | | |
| Saved searches can be configured with variables for greater flexibility | ✓ | ✓ | | |
| Details tab for contact info for hotlist module | ✓ | ✓ | | |
| Activities following tab for address book module | ✓ | ✓ | | |
| Retrieve address book entries from selected opportunity or customer service cases | ✓ | ✓ | | |
| Context video help | ✓ | ✓ | | |
| Quick search | ✓ | ✓ | | |
| Customer timeline | ✓ | ✓ | | |
| New Administrator, new users introductory videos | ✓ | ✓ | | |
| Contacts following window | ✓ | ✓ | | |

Business productivity (continued)

| User Features | Maximizer CRM 2015 | Maximizer CRM 12 | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|---|--------------------|------------------|------------------|-----------------------|
| Two-level security support for email templates | ✓ | ✓ | | |
| Email templates support merge fields in subject line | ✓ | ✓ | | |
| Email handling | ✓ | ✓ | ✓ | ✓ |
| Automated sending of outgoing emails to different email inboxes | ✓ | ✓ | | |
| Retrieve opportunities and cases | ✓ | ✓ | | |
| Appointment reminder email messages | ✓ | ✓ | ✓ | ✓ |
| Printing of individual appointments and improved print appointment details report | ✓ | ✓ | | |
| Quick updates to documents in the company library | ✓ | ✓ | | |
| Improved display of task originator | ✓ | ✓ | | |
| Task dependencies and sequencing in action plan | ✓ | ✓ | | |
| Appointment management with accounts (non Maximizer users) | ✓ | ✓ | | |
| Web links to external documents and social media profiles | ✓ | ✓ | | |
| Social media profiling | ✓ | ✓ | | |

Customisation

| User Features | Maximizer CRM 2015 | Maximizer CRM 12 | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|---|--------------------|------------------|------------------|-----------------------|
| Following tab grid: | | | | |
| Column width resizing | ✓ | | | |
| Column sorting | ✓ | | | |
| Tool tip display for drop-down lists | ✓ | | | |
| Key field lists – group titles | ✓ | | | |
| Data access web service Application Programming Interface (API) | ✓ | ✓ | | |
| Web following grid integration framework | ✓ | ✓ | | |
| Label customisation per user | ✓ | ✓ | | |

Customisation (continued)

| User Features | Maximizer CRM 2015 | Maximizer CRM 12 | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|---|--------------------|------------------|------------------|-----------------------|
| Customisable user profile such as email, address and photo | ✓ | ✓ | | |
| Customise which following windows to display | ✓ | ✓ | | |
| Startup preferences | ✓ | ✓ | | |
| Key field customisation within web access | ✓ | ✓ | | |
| Upload photos for accounts | ✓ | ✓ | | |
| Easily switch views between Individual or teams' customisation settings (saved searched, column views, favourite lists) | ✓ | ✓ | | |
| Colouring rules | ✓ | ✓ | ✓ | |
| Duplicate record checking | ✓ | ✓ | ✓ | ✓ |
| Expanded key fields customisations and display options | ✓ | ✓ | ✓ | ✓ |

Business Intelligence

| User Features | Maximizer CRM 2015 | Maximizer CRM 12 | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|--|--------------------|------------------|------------------|-----------------------|
| Web reports (sales funnel, users' activity, incoming vs. outgoing phone calls, email campaign response metrics, customer service workload reports) | ✓ | ✓ | | |
| Drill down to specific slices of pie and bar graphs in dashboards | ✓ | ✓ | | |
| Single and multi value grouping on dashboards | ✓ | ✓ | | |
| Increased number of columns in dashboards list control | ✓ | ✓ | | |
| Share dashboards via email | ✓ | ✓ | | |
| Dashboards | ✓ | ✓ | ✓ | ✓ |
| SQL Server Reporting Services (SSRS) | ✓ | ✓ | | |
| Simple Dashboards creation | ✓ | ✓ | ✓ | |

Usability enhancements

| User Features | Maximizer CRM 2015 | Maximizer CRM 12 | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|--|--------------------|------------------|------------------|-----------------------|
| Hide blank fields in key fields | ✓ | | | |
| Key fields list tooltip descriptions | ✓ | | | |
| Hide complete activities in hotlist | ✓ | | | |
| New notification panel for alarms and meeting invitations | ✓ | | | |
| Recent column set-up views | ✓ | | | |
| Hidden "following" tab for users without viewing rights | ✓ | | | |
| Type ahead in list view | ✓ | ✓ | | |
| Right click contextual menu in all modules | ✓ | ✓ | | |
| Keyboard navigation in main list view | ✓ | ✓ | | |
| Easier retrieval of mobile access URL | ✓ | ✓ | | |
| Shortcut for key fields setup | ✓ | ✓ | | |
| Ability to combine, convert and duplicate entries | ✓ | ✓ | | |
| Filters in activity tab stored between sessions | ✓ | ✓ | | |
| Associate column views to saved searches and favourite lists | ✓ | ✓ | ✓ | |
| Support for international time zones | ✓ | ✓ | ✓ | |

Integrations

| User Features | Maximizer CRM 2015 | Maximizer CRM 12 | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|---|--------------------|------------------|------------------|-----------------------|
| Tasks synchronization between Outlook and Maximizer | | | | |
| Ability to create task in Maximizer based on email in Outlook | | | | |
| Microsoft Word add-on merge personalisation fields | | | | |
| Envelope and label formatting (by system administrators) | | | | |
| Word® Add-In | | | | |
| 64-bit Word Add-in | | | | |
| Instant label & envelope merge in Word | | | | |
| Word merge | | | | |

Integrations (continued)

| User Features | Maximizer CRM 2015 | Maximizer CRM 12 | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|--|--------------------|------------------|------------------|-----------------------|
| Save documents to Maximizer entries during Word merge | ✓ | ✓ | | |
| Save any Word document to Maximizer entries | ✓ | ✓ | | |
| Outlook® Add-In | ✓ | ✓ | ✓ | ✓ |
| 64-bit Outlook Add-In | ✓ | ✓ | | |
| Auto-save emails | ✓ | ✓ | | |
| Contacts synchronization between Outlook and Maximizer | ✓ | ✓ | | |
| Saving emails to Maximizer without creating duplicates | ✓ | ✓ | | |
| Saving emails to Maximizer contacts | ✓ | ✓ | | |
| Saving emails to Maximizer opportunities | ✓ | ✓ | | |
| Saving emails to Maximizer customer service cases | ✓ | ✓ | | |
| Maximizer and Outlook calendar synching | ✓ | ✓ | | |

OS Support and Additional Features

| User Features | Maximizer CRM 2015 | Maximizer CRM 12 | Maximizer CRM 11 | Maximizer CRM 10/10.5 |
|--|--------------------|------------------|------------------|-----------------------|
| Windows 8® and Windows 8 RT support | ✓ | ✓ | | |
| Windows 8.1 | ✓ | ✓ | | |
| Internet Explorer 10® support | ✓ | ✓ | | |
| Internet Explorer 11® | ✓ | ✓ | | |
| 365 (Desktop Version Support) | ✓ | ✓ | | |
| Android 4.0® support for mobile access | ✓ | ✓ | | |
| All access licensing (Windows Desktop, Web and Mobile) | ✓ | ✓ | ✓ | |
| Optimised ribbon style interface | ✓ | ✓ | ✓ | |
| Support for Internet Explorer® & Firefox® | ✓ | ✓ | ✓ | |
| Improvements to SQL Express® storage capability | ✓ | 10 GB | 4 GB | |
| Windows Server 2012 R2 | ✓ | | | |
| Windows SQL Server 2014 | ✓ | | | |
| Microsoft Internet Information Server 8.5 | ✓ | | | |