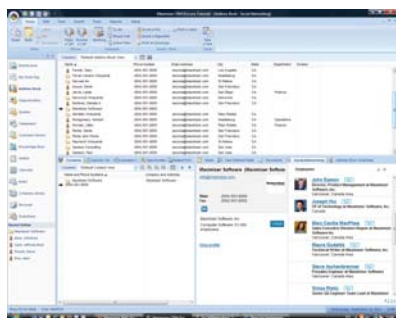


Compare your version to Maximizer CRM 12

Maximizer CRM 12 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

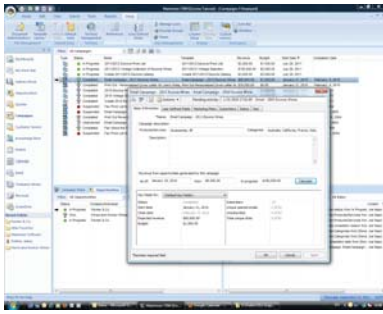


LinkedIn integration: Direct access to contact's LinkedIn profile from a contact record.

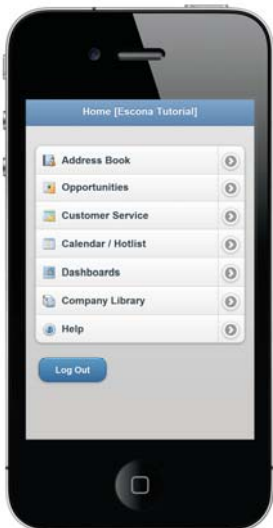
Maximizer® CRM 12 offers a whole new level of access and capability for your business to attract and engage with customers – anywhere, anytime – by providing you with an unparalleled combination of social profile building, LinkedIn integration, powerful mobile and web access to real-time data.

Get an at-a-glance view of the new features and enhancements in Maximizer CRM 12 and see how your version compares.

USER FEATURES	Maximizer Versions			
	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10.5	Maximizer CRM 10
Sales				
Capture campaign sources for leads and opportunities	New			
Email merge fields	Improved	✓		
Sales quota management ⁱ	Improved	✓		
Account management	Improved	✓	✓	✓
Sales opportunity monitoring - real time alerts	✓	✓		
Merge email templates	✓	✓		
Direct access to LinkedIn, Facebook and other web properties search	✓	✓	✓	
Sales opportunity management	✓	✓	✓	✓
Territory management ¹	✓	✓	✓	✓
Quote management	✓	✓	✓	Improved
Partner Relationship Management	✓	✓	✓	✓
Sales process methodology - lead management & forecasting	✓	✓	✓	✓
Sales forecasting	✓	✓	✓	✓
Sales executive dashboard	✓	✓	Improved	✓
Reports - sales funnel, lead summary, opportunity analysis & pipeline reports	✓	✓	✓	✓
Sales strategies & action plan	✓	✓	✓	✓
Interactive organisational charts	✓	✓	✓	✓
Marketing				
Advanced campaigns ROI management	New			
Online automated campaign templates	New			
Campaign management - response metrics	Improved	✓	✓	✓
Built-in marketing reports	Improved	✓		
Online access to Campaign Manager	✓	✓		
Multiple landing page tracking	✓	✓	✓	
Online email templates	✓	✓	✓	
Email campaign respondent lists	✓	✓	✓	✓
Campaign ROI calculator	✓	✓	✓	✓
Lead summary reports	✓	✓	✓	✓
Marketing action plans	✓	✓	✓	✓

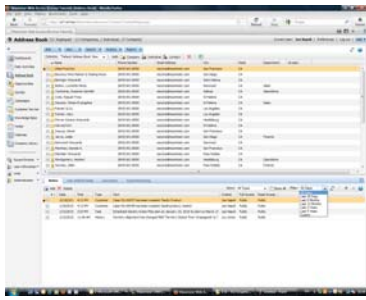


Marketing Campaign ROI: Measure marketing ROI with the ability to associate an opportunity with a particular campaign.



Mobile Access User Interface: Intuitive, easy to use touch screens optimised for the latest technology.

USER FEATURES	Maximizer Versions			
	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10.5	Maximizer CRM 10
Automatic opt-out by campaign subscriber	✓	✓	✓	✓
Real-time alerts on lead status updates, suspended & late campaigns. ²	✓	✓	✓	✓
Automated email campaigns	✓	✓	✓	✓
Automated fax and print campaigns	✓	✓	✓	✓
Automatic block sending to 'do-not-solicit' contacts	✓	✓	✓	✓
Email monitoring and automatic replies ²	✓	✓	✓	✓
Campaign failure alerts	✓	✓	✓	✓
Lead capture from website	✓	✓	✓	✓
Customer segmenting with custom fields	✓	✓	✓	✓
Customer email list management	✓	✓	✓	✓
Customer Service & Support				
Web links to Knowledge Base articles	New			
Setup notifications	Improved	✓	✓	✓
Email merge fields	Improved	✓	✓	✓
Case management (assigning, routing, queuing)	✓	✓	✓	✓
Case Resolution	✓	✓	✓	✓
Case creation directly from incoming email	✓	✓	✓	✓
Customer Service executive dashboard	✓	✓	✓	✓
Reports on overdue cases, case billing	✓	✓	✓	✓
Knowledge Base	✓	✓	✓	✓
Real-time alerts for case overload, overdue cases, status changes ²	✓	✓	✓	✓
Email monitoring and automatic replies ²	✓	✓	✓	✓
Service billing	✓	✓	✓	✓
Customer self serve web portal ³	✓	✓	✓	✓
Business Productivity				
Dashboard sharing via email	New			
Dashboard performance	Improved	✓	✓	✓
SQL Server Reporting Services (SSRS)	Improved (web access)			
Wizard-driven dashboard for simple creation	✓	✓		
Dynamic drag and drop to change dashboard layout and graphs	✓	✓	✓	
Pre-formatted reports (Maximizer, Crystal Reports, Microsoft SSRS)	✓	✓	✓	✓
Support for Crystal Reports, Crystal Reports Server and Microsoft SSRS	✓	✓	✓	✓
Mobile Access for Touchscreen Smartphones and Tablets				
Major User Interface transformation	New			
Support ⁶ for iPhone, iPad, Android Smartphones & Tablets, BlackBerry	New			
Multi-user appointments	New			
View availability for multiple users	New			
Manage Key Fields	New			
Date Filters for notes & documents	New			
Compose email dialog	Improved			
Delete appointments and tasks	New			
Mobile Dashboards	✓	✓		
Manage customer service cases	✓	✓	✓	
Manage sales opportunities	✓	✓	✓	
View and share documents	✓	✓	✓	
One click access to online maps	✓	✓	✓	✓



Web Access: View and retrieve key customer information quickly and easily with the new 2-pane window and filter options.

USER FEATURES	Maximizer Versions			
	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10.5	Maximizer CRM 10
Email notifications for appointments	✓	✓	✓	✓
Manage Accounts and Contacts	✓	✓	✓	✓
MaxMobile CRM for BlackBerry				
Favourite Lists support	New			
Appointment notifications and response	New			
Filters for notes & searches	Improved			
Organising saved searches and favourite lists	Improved			
Real time, multi user updates	✓	✓		
Email notifications for appointments	✓	✓		
Support for video, voice and image capture and storage to records	✓	✓		
View, editing and creation of documents	✓	✓		
Integration with BlackBerry GPS and multi-location maps	✓	✓		
Multi-user appointments	✓	✓		
View availability for multiple users	✓	✓		
Integration with BlackBerry and Google maps	✓	✓		
Mobile Dashboards	✓	✓	✓	✓
Integration with BlackBerry email, address book & phone	✓	✓	✓	
Wireless/Remote deployment for BlackBerry	✓	✓	✓	
One-click access to maps and directions	✓	✓	✓	
Phone/Email/SMS logging	✓	✓	✓	
Document Library	✓	✓	✓	
Customer Service Case Management	✓	✓	✓	
Support alarm for appointments and tasks	✓	✓	✓	
Internal Collaboration & Productivity				
Task Ordering, Dependencies and Sequencing in Action Plan	New			
Appointment management with external contacts	New			
Direct links to external documents & social media profiles	New			
Calendar synchronisation using web access only	New			
Calendar with product/category tracking	✓	✓	✓	✓
Multi-user calendar appointments	✓	✓	✓	✓
Calendar with resource & location management	✓	✓	✓	✓
Task management and assignment	✓	✓	✓	✓
Company-wide document management and sharing	✓	✓	✓	✓
Letters, faxes with merge fields	✓	✓	✓	✓
Customers and Prospects action plans	✓	✓	✓	✓
Contact Management & Customisations				
Social Media Profiling - LinkedIn integration	New			
Photo attachment to each Address Book entry	New			
Duplicate record checking	Improved	✓	✓	✓
Search catalogue & navigation	Improved	✓	✓	✓
Filtering options on favourite lists, column setups, search catalogues, notes and documents	Improved	✓	✓	✓
Key Field customisation & display options	Improved	✓	✓	✓
User-Defined Custom Fields organisation	Improved	✓	✓	
Formula User-Defined Custom Fields	✓	✓		
Conditional Rows Colouring/Highlighting	✓	✓		
Customisable Home Page (My Work Day)	✓	✓	✓	✓

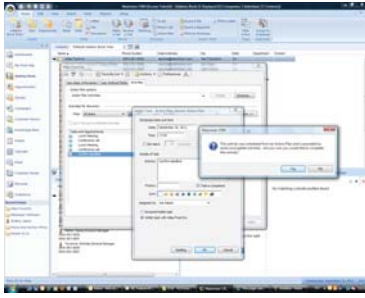
“Maximizer CRM has already added real value to our business operation and we intend to build on this. It epitomises what CRM should be – a customisable, easy to use, full service solution”

Richard Harris
Managing Director
Lely Ireland



Built-in Reports: Gain instant views of business metrics with an automated dashboard template.

USER FEATURES	Maximizer Versions			
	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10.5	Maximizer CRM 10
Import/Export data in standard formats	✓	✓	✓	✓
Support for HTML email	✓	✓	✓	✓
Unlimited User-Defined Custom Fields	✓	✓	✓	✓
Advanced searching with multiple criteria and list manipulation	✓	✓	✓	✓
Account notes and documents	✓	✓	✓	✓
Customisable column views	✓	✓	✓	✓
Usability & Supported Integrations				
Web Access User Interface	Improved			
Web Access speed & navigation	Improved			
MS Word Add-on	Improved	✓	✓	✓
Email, tasks, calendar integration with Outlook	Improved	✓	✓	✓
Maximizer Toolbar in Outlook	Improved	✓	✓	✓
All Access Licensing (desktop, web & mobile)	✓	✓		
Optimised ribbon style interface	✓	✓		
Support for Internet Explorer ⁵ and Firefox ⁵	✓	✓		
HTML Notes	✓	✓		
Associate Column View to Catalogue searches and Favourite Lists	✓	✓		
Support for international time zones	✓	✓		
Email, task, calendar integration with Microsoft Exchange Server	✓	✓	✓	✓
Works with Microsoft Excel	✓	✓	✓	✓
Works with Microsoft FrontPage	✓	✓	✓	✓
CTI (Computer Telephony Integration)	✓	✓	✓	✓
Customisable on Microsoft .NET framework ¹	✓	✓	✓	✓
Remote Synchronisation ¹	✓	✓	✓	✓
Order Management				
Quote Management	✓	✓	✓	✓
Order Management	✓	Improved	✓	✓
Customer online order tracking	✓	✓	✓	✓
Credit card processing	✓	✓	✓	✓
Product Catalogue	✓	✓	✓	✓
Business Processes & Workflow Automation				
Business activity monitoring & alerting ²	✓	✓	✓	✓
Business process automation	✓	✓	✓	✓
Automatic report distribution ²	✓	✓	✓	✓
Email monitoring and response ²	✓	✓	✓	✓
Architecture, Security and Administration				
SSRS Reports and security extensions (web only)	New			
Improvements to SQL Express storage capacity	10GB	4GB		
Improved MaxExchange distribution configuration	✓	✓		
Support for 64-bit Microsoft SQL Server editions	✓	✓	✓	
Support for 64-bit Microsoft Windows Operating System	✓	✓	✓	✓
Meta data layer through interface customisation utility	✓	✓	✓	✓
Customisation Suite	✓	✓	✓	✓
Full & Read-Only access settings	✓	✓	✓	✓
Field-level security	✓	✓	✓	✓
Role-based security groups	✓	✓	✓	✓



Dependent Tasks: Ensure processes are followed and consistent customer experiences are delivered.

USER FEATURES	Maximizer Versions			
	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10.5	Maximizer CRM 10
Support for Microsoft Systems Management Server (SMS) software distribution and installation	✓	✓	✓	✓
Administrator controlled live update	✓	✓	✓	✓
128-bit cypher public key encryption	✓	✓	✓	✓
SQL Server ¹ and SQL Server Express ⁴ database	✓	✓	✓	✓
Windows authentication for SQL Server	✓	✓	✓	✓
Single sign-on for Windows desktop and web access	✓	✓	✓	✓

1 only available in Enterprise Edition

2 workflow automation add-on required

3 requires customer portal add-on

4 only available in Group Edition

5 available on selected latest versions

6 supported on specific mobile OS versions. See our support products for more details

For a complete list of supported products, visit <http://www.max.co.uk/support-a-services/supported-products>

Technology Partners



Certified Solution Provider



Why Maximizer CRM 12?

1. **Simple & Quick** to deploy, learn, use and maintain
2. **Access Options** through web, desktop, mobile smartphones and tablets
3. **Value.** Best Value for a full-featured CRM, low total cost of ownership
4. **Expertise.** More than 20 years as a pioneer and leader in CRM.

Maximizer CRM helps small and medium-sized businesses maximise sales, customer satisfaction and profitability through increased business productivity and optimisation of limited resources

Visit www.max.co.uk for:

- Information based on your role: sales, marketing, service, executive, IT
- Information on CRM and Contact Management
- An overview of features and technology
- Online demos and free trial software
- White papers and webinars on CRM best practices

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