



Maximizer CRM

VERSION COMPARISON

Maximizer CRM 2015, released October 1, 2014, includes many new features and enhancements designed to deliver increased flexibility, intelligence, and security.

Sales

User Features	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Opportunities following tab in address book and hotlist modules	•	•		
Better linkage between contacts and associated account manager	•	•		
Web lead capture	•	•		
Capture campaign sources for leads and opportunities	•	•		
Sales quota management ¹	•	•	•	
Email merge fields	•	•	•	
Email merge templates	•	•	•	
Sales opportunity monitoring	•	•	•	
Opportunity details tab	•			
Define mandatory fields in opportunities using logic and rules	•			

1 - Only available in Enterprise Edition and Maximizer CRM Live

Customer Service & Support

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	●	●	●	●

Marketing

User Features	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Web lead capture	●	●		
Campaign ROI management	●	●		
Automated campaign templates	●	●		
Campaign response metrics	●	●	●	●
Built-in marketing reports	●	●	●	
Campaign manager web access	●	●	●	
Anti-spam functionality	●			
HTML text editor	Enhanced	●		

Business Productivity

User Features	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Ability to define mandatory fields in address book entries using logic and rules	•	•		
User-defined fields with clickable hyperlinks	•	•		
One click to map from contact address	•	•	•	•
Quick access for frequently used saved searches and favorite 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 CS cases	•	•		
Context video help	•	•		
Quick search	•	•		
Customer timeline	•	•		
Contacts following window	•	•		
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	•	•		

Task dependencies and sequencing in action plan	●	●		
Appointment management with accounts (Non Maximizer users)	●	●		
Web links to external documents and social media profiles	●	●		
Anti-spam functionality	●			
Enhanced email unsubscribe functionality	●			
Web form for email preference management	●			
Notes and emails text editor	Enhanced	●		
Pre-built email and campaign templates	●			
Activities following tab	●			
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	●			
VOIP integration	●			
In-product "help" videos (Hotlists, email, notes and documents, global editing, user management, etc.)	●	●		
Address Book contact social media web search	●			

Customizations

User Features	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Data access web service API	●	●		
Web following grid integration framework	●	●		
Label customization per user	●	●		
Customizable user profile such as email, address and photo	●	●		
Customize which following windows to display	●	●		
Startup preferences	●	●		
Key fields customization within web access	●	●		
Upload photos for Accounts	●	●		
Easily switch views between individual or teams' customization settings (Saved searches, column views, favorite lists)	●	●		
Coloring rules	●	●		
Duplicate record checking	●	●	●	●
Expanded key fields customizations and display options	●	●	●	●
Following tab grid (Column width resizing, column sorting, tooltip display for drop-down lists)	●			
Key field list group titles	●			

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	●	●	●	
Pre-built Excel report templates (Address Book, Customer Service, Opportunity, Campaigns)	●			
Auditing functionality (changes made to Address Book)	●			

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 Playbook)	●	●		
Mobile access for smartphones (Phone, Android, Blackberry)	●	●		
Automatic login option for quicker access	●	●		
Quick search	●	●		
Additional search options (By cases, by city, by state and by zip)	●	●		
Customizable 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	●	●	●	

Usability Enhancements

User Features	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
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 favorite lists	●	●	●	
Support for international time zones	●	●	●	
Hide blank fields in key fields list	●			
Key field list tooltip descriptions	●			
Hide completed activities in hotlist	●			
New notification panel for alarms and meeting invitations	●			
Recent column setup views	●			
Column setup alignment editing	●			
Hidden "following" tab for users without viewing rights	●			

Integrations

User Features	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Word add-in	•	•		
64-bit Word add-in	•	•		
Instant label & envelope merge in Word	•	•		
Word Merge	•	•		
Save documents to Maximizer entries during Word merge	•	•		
Save any Word document to entries	•	•		
Outlook add-in	•	•	•	•
64-bit Outlook add-in	•	•		
Auto-save emails	•	•		
Contacts synchronization between Outlook and Maximizer	•	•		
Tasks Synchronization between Outlook and Maximizer	•	•		
Ability to create task in Maximizer based on email in Outlook	•	•		
Saving emails to Maximizer without creating duplicates	•	•		
Saving emails to Maximizer contacts	•	•		
Saving emails to Maximizer opportunities	•	•		
Saving email to Maximizer CS cases	•	•		
Maximizer and Outlook calendar synching	•	•		
Mr./Ms. merge fields in Word add-on	•			
Envelope and label address formatting (By system administrators)	•			

OS Support and Additional Features

User Features	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Windows 8 Support	●	●		
Windows 8 RT Support	●	●		
Windows 8.1	●	●		
Microsoft Office 365 Support (Desktop version)	●	●		
Internet Explorer 8 support		●		
Internet Explorer 9, 10, 11	●	●		
Android 4.0 support for Mobile Access	●	●		
iOS 7 support for Mobile Access	●	●		
BlackBerry Z10 Support	●	●		
All Access Licensing (Windows desktop, web and mobile)	●	●	●	
Optimized ribbon style interface	●	●	●	
Support for Internet Explorer & Firefox	●	●	●	
Improvements to SQL express storage capacity	●	●	4GB	
Windows Server 2012 R2	●	●		
Windows SQL Server 2014	●			
Microsoft Internet Information Server 8.5	●			

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