



**OVERVIEW**

# Maximizer CRM 2017 Overview

| A COMPREHENSIVE LOOK AT MAXIMIZER'S LATEST CRM SOLUTION

Published By |

 **MAXIMIZER CRM**

## About Maximizer

Maximizer has been fueling the growth of businesses around the world for almost 30 years. Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise and cloud deployment options, tailored-to-fit flexibility, state-of-the-art security infrastructure, industry-specific editions and anywhere/anytime mobile access, Maximizer is the CRM solution of choice for SMEs.

**Maximizer CRM 2017** is designed to help businesses use their CRM application as a system of engagement that manages the entire customer lifecycle, from acquisition through retention and expansion. The 2017 edition features innovative automations, enhanced business process configuration, expanded API infrastructure and a user-friendly design that helps organizations deliver exceptional service at every stage along the customer journey.

## MAXIMIZER CRM 2017 NEW FEATURES & FUNCTIONALITY

- **Productivity Boosting Automations** - Eliminate manual and repetitive task through auto updates and calculations, set unique business processes for each customer segment
- **Engaging User Experience** - New calendar and appointment setting capabilities, clear module identification and modern colours, fonts and icons
- **Expanded API Infrastructure** - Helping you connect with thousands of applications that provide deeper customer insight



# 17 REASONS TO LOVE MAXIMIZER CRM 2017

1. **Your Success is Our Success - Every Maximizer and Certified Solution Provider team member is committed to helping you achieve CRM and business success**
2. **Cloud or On-premise Deployment - The choice is all yours**
3. **Data Security - Protected and monitored 24/7**
4. **Rapid Deployment - Installation support and customized training gets you up and running fast**
5. **Easy Access Users Rave About - "Customer Service is superb"**
6. **Integration with Outlook - Add contacts and more without switching systems**
7. **Configurable - Add unlimited custom fields to match your unique needs**
8. **Low TCO & Fast ROI - Build relationships that turn into revenue**
9. **Expanded API Infrastructure - Connect with thousands of applications for deeper insight**
10. **Centralisation of Customer Data - EMEA Customers Rated as #1 Benefit of CRM**
11. **Increased Visibility of Communications and Activities - EMEA Customers Rated as #2 Benefit of CRM**
12. **Deep Customer Insight - Consolidated within a single view, with drill down for more**
13. **Enhanced Productivity - Innovative automations eliminate manual, repetitive tasks**
14. **Improved Customer Segmentation - EMEA Customers Rated as #5 Benefit of CRM**
15. **Multiple Business Processes - Set them up to match customer segments and lifecycle stages**
16. **Integration with MailChimp Marketing Automation Platform - Keep contacts, data and results in sync**
17. **Anywhere, Anytime Access - When visiting customers and working remotely**

## New in Maximizer CRM 2017 Productivity Boosters

- **Business Processes for Each Customer Segment** - Why treat all customers the same when you can tailor your business processes and opportunity stages to match the buying lifecycle of each customer group? Set up business processes for each segment to provide proactive, relevant service and support.
- **Automatic Elapsed Time/Duration Calculation** - Automatically calculates elapsed time from a start date. Easily setup to track critical timeframes such as time passed since last contact, contract renewal dates and personal anniversaries. Can be used to automatically update data displayed in dashboards, searches and column views.
- **Automatic Update of Last Contact Date** - Automatically tracks when a client was last contacted, based on emails sent, appointments completed, manually-set date and more. Can be used to highlight clients with pending and overdue contact and more.
- **Customized templates for appointments and reminders** - Elevate the professionalism of your communication by creating branded email templates for notifications and reminders. Create multiple templates for different audiences or communication types, with headers and footers that reinforce your corporate story.

- **Simplified Reporting Setup** - Choose a column setup before generating a report to view the exact dataset you need. Simplified one-click report generation gets you relevant information faster and easier.

### User Experience Enhancements

- **Modern, clean interface** - Fresh colours, easy to read type
- **Calendar Usability** - Significantly easier to see the availability of co-workers and resources such as meeting rooms, ownership over appointments you set up, easy to read appointment details.
- **Module identification** - Clearer identification of which CRM module you're working in.
- **Floating Notification Panel** - Non-intrusive notification of events, tasks, etc. even when your browser window is minimized (Chrome, Firefox only).

### Expanded Integration Infrastructure

- **Expanding list of enterprise application integration (EAI) technologies** we work with to enrich the breadth of solutions available to customers in the cloud, and provide deeper customer insight.
- **Integration with Outlook** - Do more without switching systems - easily add new contact details and email communication, and quickly set up a Sales Opportunity or follow-up Task in Maximizer from within Outlook.
- **Integration with MailChimp** - Marketing Automation Platform Maximizer Connect for Use with MailChimp helps you keep marketing campaign data and contacts in sync, and delivers visibility into MailChimp campaign results within Maximizer.

## The All-Inclusive Maximizer CRM Solution

### Sales Management Functionality For Maximum Team Productivity

With all client information centralized in a single view that's accessible anywhere, anytime, it's easy to respond to new and existing opportunities, manage accounts and accurately forecast your sales pipeline and revenue.

**Effectively Manage Accounts** - Build long term customer relationships, manage accounts and personalize your view. Search on any field and create one-click access to frequently used customer and prospect lists. Manage sales territories by setting up parameters for lead assignment and record access.

**Increase Close Rates** - Monitor the effectiveness of your sales team by measuring close, abandon and loss rates for all opportunities. Discover where to focus sales efforts and move towards a predictable sales pipeline.

**Improve Sales Forecast Accuracy** - Built-in sales forecasting and management makes light work of tracking progress against goals. Graphical sales reports that match your sales process provide visibility into every detail including probability of close, allowing you to take proactive measures to ensure your team hits their targets.

**Effectively Manage Sales Leads** - Ensure all leads are handled in a timely manner, leading to higher sales conversion and revenue. Automatically alert the right person for follow up, and track the status and source of every opportunity to measure funnel and conversion rate.



**Real Time Insight** - Stay on top of productivity and revenues with real-time visual snapshots of company and team performance. Easily configure dashboards and customizable report templates to provide the insight needed to adjust tactics or re-focus resources.

**Anywhere, Anytime Mobile Access** - Easily manage appointments, view critical customer and prospect data and monitor key metrics from your desk, at home or on the road with 24/7 access via any smartphone, tablet or any web-enabled mobile device.

### Marketing Functionality For Personalized Customer Communications

Consumers do their own research long before reaching out to talk to your sales team, so it's critical to provide them with the information they need to make a purchase decision. Automated multi-phase campaign scheduling, list management, web forms, and a Return On Investment (ROI) calculator make it easy to deliver the content customers and prospects need, and ensure you spend your marketing budget and resources wisely.

**Fill the Sales Pipeline with Qualified Leads** - Segment your customers and prospects to receive relevant information targeted to each audience. List management capabilities allow you to search and filter data, ensuring your campaigns move targets along the buyer's journey and prepare them for a sales conversation.

**Automated Campaign Management** - Maximizer's Campaign Manager makes it easy to execute multi-phased email campaigns that automatically nurture relationships over time. Events like site downloads, purchases and service incidents can trigger specific automated email campaigns that offer appropriate and timely resources.

**Web-To-Lead Forms** - Wizard-driven web forms capture online enquiries which can be customized, branded and used for a variety of marketing campaigns, from free trials to event registration, online surveys and more. Form data can be imported directly into Maximizer and into the hands of the right sales person.

**Monitor Key Metrics** - In-depth marketing dashboards provide insight into every campaign performance, lead source tracking and more. Get real time insight on conversions from leads to opportunities, opportunities to sales, and measure Marketing's contribution to business success.

**Integrate with MailChimp** - Keep marketing campaign data in sync and see individual results from MailChimp email campaigns within Maximizer via two-way synchronization of contact and campaign data between Maximizer CRM and MailChimp.

### Customer Service & Support Excellence

The future of your business depends on your ability to keep customers happy. In doing so, they'll reward you with repeat business, bigger orders and valuable referrals. Maximizer makes it easy to arm your Customer Service team with all the information they need to answer questions, resolve issues quickly and turn customers into champions.

**Unified Information** - Empower Customer Service with the background information they need for resolution-focused conversations. Capture email, phone, web and even Sales data points to provide a complete case history of origin, severity, priority, status, previous communication and all related documents.

**Case Management** - Easily raise resolution tickets, complete with case numbers, product categories, assignments and other details that are fully searchable for quick access. Use alerts and notifications for faster response time and escalation of more serious issues to subject matter experts.

**Central Knowledge Base** - There's no need to reinvent the wheel when you can share details on successful incident resolution, frequently asked questions and detailed product information with your Customer Service team and customers in a searchable online library.

**Customer Self-Service** - Reduce administration and improve data quality by giving customers access to your database and select fields. Customers simply login via a web portal integrated with Maximizer to update their contact data and view service case and order status.

**Computer Telephony Integration (CTI)**  
- Detect and display corresponding records, capture critical client history and improve call accuracy for both inbound and outbound calls.

**Service Level Insight** - Track team performance across key metrics with pre-built dashboards and customizable reports, plus use the intelligence to improve service levels and speed of response over time.

## Flexible Deployment Options

### Maximizer CRM - Our Cloud or Your Server

- Maximizer CRM Live, hosted in the cloud, gives you access to all Maximizer CRM 2017 features and functionality automatically. And you can rest assured that your information is stored in a data centre with world-class reliability and security. Maximizer undergoes

comprehensive ISO9001 penetration testing with each major release to ensure our solutions meet stringent security standards.

You can choose to host your Maximizer CRM solution on a dedicated server in a private hosted cloud that isn't shared with other companies, and include other business software you use to significantly lower costs.

**Maximizer CRM On-Premise Web Access** - Maximizer CRM 2017 can also be deployed on-premise, via your own internal web access server.

**Partner-hosted Maximizer CRM** - Your Maximizer CRM solution can be hosted with one of our Certified Solution Providers.

**Third Party Data Centre Hosting** - If you use a third party data centre to host other cloud services and applications, you can maximize your investment by installing the Maximizer web-access solution on your existing third party infrastructure.

## Analytics For insight-Driven Decision Making

Not only does the Maximizer CRM two-pane, multi-tab display highlight important information and drill down for deeper insight, the pre-built reports and dashboard make it easy to Interpret crucial metrics, turning data into information, and knowledge.

**Business Intelligence** - Pre-built sales, marketing, service and management-focused dashboards and more than 175 pre-designed reports put customer analysis and actionable information into the hands of decision-makers and help them solve problems, seize opportunities and refine everyday processes.

**Configurable Dashboards** - Real time, configurable snapshots of Key Performance Indicators (KPIs) allow leaders to respond to sales, marketing and service performance, and adjust tactics or resources quickly. View results at a glance in your preferred format, drill down or export to Excel to investigate further.

**Pre-Built Excel® Reports** - Find critical information, identify and analyze trends and make better decisions using ready-made Excel report templates for the Address Book, Customer Service, Opportunities and Campaigns. Modify reports to meet exact requirements, then upload them to the Report Library for future use.

### **Mobile CRM For Anytime, Anywhere Access**

When on the road or working from home, you can access vital customer data, along with your tasks and reports via your smartphone, tablet or laptop.

**Access to Real Time Information** - Remote team members can access current contact details and update sales opportunities, marketing campaigns and customer service cases.

**Manage Tasks On-The-Go** - Update contact details, tasks, calendar appointments, sales

opportunity data and customer service case information anywhere, anytime.

**Stay Connected** - Easily search for key contacts and accounts directly from the home screen, send emails or make phone calls with a single one-click touch. When remote employees upload new contact or account details, they automatically synchronize to ensure on-site teams see the same information.

### **Data Security**

Your data is stored in our world-class Tier IV data centres (or a data centre of your choice), and protected by CRM Services that monitor and regulate access and usage. Our network is protected via key encryption and two-factor authentication, plus all data is backed up and stored in secure multi-site centres. Compliance with ISO9001 and ISO27001 ensures your software and data are protected 24/7 by stringent security standards. And your data belongs to you, now and forever.

### **Configurability**

We give you the power to change field names and add unlimited custom fields to match your unique needs. Create new fields in the Address Book as well as under Opportunities, Campaigns and Customer Service, and choose from alpha-numeric, date-based, formula-driven, numeric, table and yes/no field types.

### **Rapid Deployment**

Our team of highly experienced Professional Services Consultants and global network of Certified Solution Providers can help transform your business while maximizing the value of your CRM software.

Certified Consultants with deep technical expertise in cloud technologies, web development and integration are available worldwide to support your full implementation lifecycle; from closed loop lead tracking to sales forecasting, customer service, activity tracking and much more. Choose from a range of professional services options, including installation support and customized training, to get you up and running quickly and smoothly.

### Support Users Rave About

We ask customers what they like best about working with Maximizer. “Customer Service is superb” “Technical Support is excellent” Need we say more?

### Live Complimentary Training Webinars

Customers told us they wanted to learn how to use Maximizer CRM to the max, so we provide comprehensive training webinars. Every year, thousands of users attend the basic, intermediate and advanced sessions to expand their skill set and the value they get from Maximizer CRM.

### Low Total Cost of Ownership and Fast ROI

One of the biggest concerns associated with cloud CRM is the long-term total cost of ownership (TCO). A landmark TCO study conducted by the Yankee Group on hosted CRM systems versus on-premise solutions for SMEs concluded that on-premise CRM solutions were considerably more expensive over the course of a five-year period than cloud-based alternatives.

The Yankee Report found these key advantages for cloud-based CRM solutions:

- Faster implementation and ramp-up time to productive use of applications
- Lower upfront and ongoing costs
- No additional IT infrastructure for servers, networks, storage and IT resources to support them
- No additional IT application support staff
- Guaranteed service-level agreements (SLAs)
- Vendors provide an enterprise-class infrastructure with appropriate servers, networking and storage systems; plus, they are responsible for frequent upgrade application with each new version release, regular customer data backups and required restores, as well as meeting the latest security and compliance requirements.

Maximizer CRM Live takes very little time to deploy and update, has the core features and functionality businesses needs to grow and be more productive and, most importantly, generate a healthy ROI – at a low total cost over the long term. Maximizer CRM customers reap big benefits by building deep customer relationships that lead to more sales.



# Maximizer CRM Edition Comparison

## Sales Functionality

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Setup Business Processes for each customer segment	●					
Stage aging monitoring	●					
Customized templates for appointments and reminders	●					
Opportunity Details following tab	●	●	●			
Forecast report	●	●				
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 <sup>1</sup>	●	●	●	●		
Email merge fields	●	Enhanced	●	●		
Email merge templates	●	Enhanced	●	●		
Sales opportunity monitoring	●	●	●	●		
Define mandatory fields in opportunities using logic and rules	●	●				

## Customer Service and Support Functionality

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Case Details following tab	●	●				
Define mandatory fields in cases using logic and rules	●	●	●	●		
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/Functionality

User Features	Maximizer CRM 2017	Maximizer CRM 2016	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	●	Enhanced	●	●	●	

## Marketing Continued

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Anti-spam functionality	●	●	●			
HTML text editor	●	●	Enhanced	●		

## Business Productivity Functionality

Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Automated Elapsed Time/Duration Calculation	●					
Automated Update of Last Contact Date	●					
Template for Word (invoice, letter, purchase order, etc)	●					
Ignore year for search date fields by rolling date range	●	●				
Perform other actions while editing a note	●	●				
Notes filter that allows selecting multiple note types	●	●	●	●		
Documents filter that allows selecting multiple document types and categories	●	●	●	●		
Default document	●	●	●	●		
Centralized template library for documents and Excel reports	●	●	●	●	●	●
Ability to define mandatory fields in Address Book entries using logic and rules	●	●	●	●	●	●
User-defined fields with clickable hyperlinks	●	●	●	●		

## Business Productivity Continued

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Centralized template library for documents and Excel reports	●	●	●	●	●	●
Ability to define mandatory fields in Address Book entries using logic and rules	●	●	●	●	●	●
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	●	●	●	●		
Retrieve Address Book entries from selected opportunities or CS cases	●	●	●	●		
Context video help	●	●	●	●		
Quick search	●	●	●	●		
Customer timeline	●	●	●	●		
Contacts following window	●	●	●	●		
Email handling	●	●	●	●	●	●
Automated sending of outgoing emails to different email inboxes	●	●	●	●		

## Business Productivity Continued

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Search Address Book entries by partner	●	●				
Retrieve partners for the selected Address Book entries	●	●				
Retrieve opportunities and cases	●	●	●	●		
Appointment reminder email messages	●	●	●	●	●	●
Printing of individual appointments and improved print appointment details report	●	●	●	●		
View multiple users' activities in Hotlist	●	●				
Monitor tasks you have assigned to other users	●	●				
Batch editing task dates	●	●				
Task dependencies and sequencing in action plan	●	●	●	●		
Appointment management with accounts (Non-Maximizer users)	●	●	●	●		
Web links to external documents and social media profiles	●	●	●	●		
Enhanced email unsubscribe functionality						



## Business Productivity Continued

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
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.)	●	●	●			
In-product "help" videos	●	●	●	●		
Address Book contact social media web search	●	●	●			

## Customizations

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Data access web service Application Programming Interface (API)	Enhanced	●	●	●		
Web following grid integration framework	●	●	●	●		
Search Address Book entries by the fields in custom following tabs	●	Enhanced	●			
Label customization per user	●	●	●	●		
Customizable user profile such as email, address and photo	●	●	●	●		
Customize which following windows to display	●	●	●	●		
Startup preferences	Enhanced	●	●	●		
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)	●	●	●	●		
Colouring rules	●	●	●	●		
Duplicate record checking	●	●	●	●	●	●
Expanded key fields customizations and display options	●	●	●	●	●	●

## Customizations Continued

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Following tab grid (Column width resizing, column sorting, tooltip display for drop-down lists)	●	●	●	●		
Key field list group titles	●	●	●	●		

## Business Intelligence Functionality

Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Simplified Reporting Setup	●					
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	●	Enhanced	●	●		
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)	Web Access Only	Web Access Only	●	●		
Simple dashboards creation	●	●	●	●	●	

## Business Intelligence Functionality Continued

Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Pre-built Excel report templates (Address Book, Customer Service, Opportunity, Campaigns)	●	Enhanced	●			
Auditing functionality (changes made to Address Book entries)	●	●	●	●		

## Mobile Access

Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Setup Business Processes for each customer segment	●					
Automated Elapsed Time/Duration Calculation	●					
Automated Update of Last Contact Date	●					
All day/multi-day appointments	●					
Mobile access for tablets (iPad, Android tablets)	●	●	●	●		
Prompt for value when retrieving a saved search	●	●	●	●		
Select predefined subject line for tasks, appointments	●	●				
Quick Access shortcuts in Home Screen	●	●				
Preferences module that defines the startup screen	●	●				
Send email from an opportunity or a case	●	●				
Automatic login option for quicker access	●	●	●	●		

## Mobile Access Continued

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Quick search	●	●	●	●		
Additional search options (By cases, by city, by state and by postcode zip)	●	●	●	●		
Customizable column views	●	●	●	●		
Open and share documents	●	●	●	●		
Create shortcut on device homescreen	●	●	●	●		
Shortcut to email/call in list view (For smartphones)	●	●	●	●		
Multi-user appointments	●	Enhanced	●	●		
Manage key fields	●	●	●	●		
Send emails	●	Enhanced	●	●		
Manage appointments	●	●	●	●		
Manage dashboards	●	●	●	●	●	
Change the maximum number of entries that can be retrieved	●	Enhanced	●	●	●	



## Usability Enhancements

Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Modern interface	●					
Enhanced calendar usability	●					
Clearer module identification	●					
Floating Notification Panel	●					
Auto-adjust row height	●	●				
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	●	●	●	●	●	

## Usability Enhancements Continued

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Hide completed activities in hotlist	●	●	●			
Notification panel for alarms and meeting invitations	●	●	●			
Recent column setup views	●	●	●			
Column setup alignment editing	●	●	●			
Hidden “following” tab for users without viewing rights	●	●	●			
More columns in the dialogs for searching for Address Book entries and in appointment	●	●				
Place commonly used Maximizer Outlook integration buttons into the Home tab of Outlook	●	●				
Custom address formatting	●	●	●			

## Integrations

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Expanded API Infrastructure	●					
Integration with Outlook 365 (Web version)	●					
Integration with MailChimp	●					
Integration with Zapier	●					
Word add-in	●	●	●	●		
64-bit Word add-in	●					

## Integrations Continued

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Word Merge	●	●	●	●		
Access document templates stored in Maximizer in Word add-in	●	●	●			
Create or update Maximizer document templates in Word add-in	●	●	●			
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 by email conversation	●	●	●	●		
Auto-save emails by email address	●	●	●			
Create a note against Maximizer entry when saving an email in Outlook add-in	●	●				
Specify document name and description when saving an email from Outlook add-in	●	●				
Contacts synchronization between Outlook and Maximizer	●	●	●	●		
Tasks Synchronization between Outlook and Maximizer	●	●	●	●		
Ability to create task in Maximizer based on email in Outlook	●	●	●	●		

## Integrations Continued

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Saving emails to Maximizer without creating duplicates	●	●	●	●		
Save emails to Maximizer opportunities	●	●	●	●		
Save email to Maximizer Customer Service cases	●	●	●	●		
Maximizer and Outlook calendar synching	●	●	●	●		
Mr./Ms. merge fields in Word add-in	●	●	●			
Envelope and label address formatting	●	●	●			

## OS Support and Additional Features

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Windows 10 Support	● *	●				
Windows 8.1 Support	● *	●	●	●		
Windows 8 Support	● *	●	●	●		
Windows 8 RT Support	● *	●	●	●		
Microsoft Office 365 Support (Desktop version)	● *	●	●	●		
Internet Explorer 11	●	●	●	●		
Internet Explorer 9, 10		●	●	●		
Internet Explorer 8				●		

## OS Support and Additional Features Continued

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12	Maximizer CRM 11	Maximizer CRM 10/10.5
Google Chrome	●	●		●		
Mozilla FireFox for Windows and Mac	●	●	●	●	●	
Android support for Mobile Access	Support up to 6.0.1	Support up to 5.0	Support up to 4.3	●		
iOS support for Mobile Access	Support up to iOS 9	Support up to iOS 8	iOS 7	●		
BlackBerry Z10			●	●		
All Access Licensing (Windows desktop, web and mobile)	●	●	●	●	●	
Service Access Licensing	●	●				
Optimized ribbon style interface	●	●	●	●	●	
Improvements to SQL express storage capacity	●	●	●	●	4BG	
Windows Server 2016	●					
Windows SQL Server 2014	●	●	●			
Windows Server 2016	●					
Windows Server 2012 R2	●	●	●	●		
Microsoft Internet Information Server 10	●					
Microsoft Internet Information Server 8.5	●	●	●			

\*Works with Maximizer CRM Web Access; cannot install Maximizer CRM Server component on these OS. Check for current information at <http://ww2.maximizer.com/support/group-enterprise-2017.html>



## About Maximizer

### Maximizer CRM is fueling the growth of businesses around the world.

Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise, our cloud and your cloud deployment options, tailored-to-fit flexibility, state-of-the art security infrastructure, industry-specific editions and anywhere/anytime mobile access, Maximizer is the affordable CRM solution of choice.

From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.

## Certified Solution Provider



Camsoft provides full turnkey CRM solutions, including software sales, training, support, development and service level agreements, where required. Camsoft's offices are located in Johannesburg, Cape Town and Durban.

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