

## Maximizer CRM 12 Summer 2013 Version Comparison Chart

### Performance, Usability, Simplicity Enhanced



The Maximizer Summer 12 2013 release continues to build on the theme of enhanced performance, usability and productivity while maintaining Maximizer's position in the market as a simple and easy to use CRM for small to medium businesses and enterprise organizations.

To be successful your sales, customer service, and marketing teams need access to critical customer information – anywhere and anytime.

The Maximizer Summer 12 2013 release speaks to this by providing enhancements and new features that makes it easier to access information from your mobile, more integrative features with Microsoft Office applications, and overall access and usability improvements for Web and On Premise.

# Version Comparison

The Maximizer CRM 12 Summer 2013 release provides new features and enhancements.

The following chart provides a comprehensive comparison of new and/or enhanced features and capabilities of the Maximizer CRM 12 Summer 2013 release with previous versions of Maximizer.

## Mobile Access

User Features	Maximizer CRM 12 (Summer 13)	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	✓	New in Winter 2012		
Quick Search	✓	✓		
Additional Search options (by Cases, by City, By State and by Zip)	✓	New in Winter 2012		
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	✓	✓	✓	

# Version Comparison

## Sales

User Features	Maximizer CRM 12 (Summer 13)	Maximizer CRM 12*	Maximizer CRM 11	Maximizer CRM 10/10.5
Opportunities following tab in Address Book and Hotlist modules	✓	New in Winter 2012 <sup>1</sup>		
Better linkage between contacts and associated Account Manager	✓	✓		
Web Lead Capture	✓ <sub>1</sub>	✓ <sub>1</sub>		
Capture campaign sources for leads and opportunities	✓	✓		
Sales Quota Management <sup>2</sup>	✓	Improved	✓	
Email Merge Fields	✓	Improved	✓	
Email Merge Templates	✓	Improved	✓	
Sales Opportunity Monitoring	✓	✓	✓	

## Marketing

User Features	Maximizer CRM 12 (Summer 13)	Maximizer CRM 12*	Maximizer CRM 11	Maximizer CRM 10/10.5
Web Lead Capture	✓ <sub>1</sub>	✓ <sub>1</sub>		
Campaigns ROI Management	✓	✓		
Automated Campaign Templates	✓	✓		
Campaign Response Metrics	✓	Improved	✓	✓
Built-In Marketing Reports	✓	Improved	✓	

# Version Comparison



User Features	Maximizer CRM 12 (Summer 13)	Maximizer CRM 12*	Maximizer CRM 11	Maximizer CRM 10/10.5
Campaign Manager Web Access	✓	✓	✓	

## Customer Service & Support

User Features	Maximizer CRM 12 (Summer 13)	Maximizer CRM 12*	Maximizer CRM 11	Maximizer CRM 10/10.5
Pre-defined subjects included in Search Dialog	New in Summer 2013			
Customer Service following tab in Address Book and Hotlist modules	New in Summer 2013			
Web links to Knowledge Base Articles	✓	✓		
Notifications	✓	Improved	✓	✓
Email Merge Fields	✓	Improved	✓	✓

## Business Productivity

User Features	Maximizer CRM 12 (Summer 13)	Maximizer CRM 12*	Maximizer CRM 11	Maximizer CRM 10/10.5
New Address Book interface for improved performance and usability	✓	New in Winter 2012 <sup>1</sup>		
Ability to define mandatory fields in address book entries using logic and rules	New in Summer 2013			
User-Defined Fields now supports clickable hyperlinks	New in Summer 2013			

# Version Comparison



User Features	Maximizer CRM 12 (Summer 13)	Maximizer CRM 12*	Maximizer CRM 11	Maximizer CRM 10/10.5
One click to Map from Contact Address	✓	New in Winter 2012 <sup>1</sup>	✓	✓
Quick Access for frequently used Saved Searches and Favorite Lists	✓	New in Winter 2012 <sup>1</sup>	✓	✓
Saved Searches can be configured with variables for greater flexibility	New in Summer 2013 (Added to web client)			
New Details tab for contact info for Hotlist module	✓	New in Winter 2012 <sup>1</sup>		
Activities following tab for Address Book module	✓	New in Winter 2012 <sup>1</sup>		
Retrieve Address Book entries from selected Opportunity or CS Cases	✓	New in Winter 2012		
Context Video Help	Improved	New in Winter 2012 <sup>1</sup>		
Quick Search	Improved	✓		
Customer Timeline	✓ <sub>1</sub>	✓ <sub>1</sub>		
New Administrator, New Users Introductory Videos	✓ <sub>1</sub>	✓ <sub>1</sub>		
Contacts Following Window	✓ <sub>1</sub>	✓ <sub>1</sub>		
Two-level security support for email templates	New in Summer 2013			
Email templates supports merge field in subject line	New in Summer 2013			
Email handling	Improved	✓	✓	✓
Automated sending of outgoing emails to different email inboxes	✓ <sub>1</sub>	✓ <sub>1</sub>		
Retrieve Opportunities and Cases	✓ <sub>1</sub>	✓ <sub>1</sub>		

# Version Comparison



User Features	Maximizer CRM 12 (Summer 13)	Maximizer CRM 12*	Maximizer CRM 11	Maximizer CRM 10/10.5
Appointment Reminder email messages	✓	Improved in Winter 2012	✓	✓
Printing of individual appointments and improved Print Appointment Details report	New in Summer 2013			
Quick updates to documents in the Company Library	✓ <sub>1</sub>	✓ <sub>1</sub>		
Improved display of task originator	✓ <sub>1</sub>	✓ <sub>1</sub>		
Task Dependencies and Sequencing in Action Plan	Improved	✓		
Appointment Management with Accounts (non Maximizer users)	✓	✓		
Web Links to external documents and social media profiles	✓	✓		
Social Media Profiling – LinkedIn Integration	✓	✓		

## Customizations

User Features	Maximizer CRM 12 (Summer 13)	Maximizer CRM 12*	Maximizer CRM 11	Maximizer CRM 10/10.5
Data Access Web Service API	Improved	New in Winter 2012 <sup>1</sup>		
Web Following Grid Integration Framework	✓	New in Winter 2012 <sup>1</sup>		
Label customization per user	✓	New in Winter 2012		
Customizable user profile such as email, address and photo	✓ <sub>1</sub>	✓ <sub>1</sub>		
Customize which following windows to display	✓ <sub>1</sub>	✓ <sub>1</sub>		
Startup Preferences	✓ <sub>1</sub>	✓ <sub>1</sub>		
Key Fields customization within Web Access	New in Summer 2013			
Upload photos for Accounts	✓ <sub>1</sub>	✓ <sub>1</sub>		
Easily switch views between individual or teams' customization settings (saved searches, column views, favorite lists)	Improved	✓		
Coloring Rules	Improved	✓	✓	
Duplicate Record Checking	Improved	Improved	✓	✓
Expanded Key Fields Customizations and Display Options	Improved	Improved	✓	✓

## Business Intelligence

User Features	Maximizer CRM 12 (Summer 13)	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	✓ <sub>1</sub>	✓ <sub>1</sub>		
Drill Down to specific slices of pie and bar graphs in Dashboards	✓ <sub>1</sub>	✓ <sub>1</sub>		
Single and Multi Value Grouping on Dashboards	✓	✓		
Increased # of Columns in Dashboards List Control	✓	✓		
Share Dashboards via Email	✓ <sub>1</sub>	✓ <sub>1</sub>		
Dashboards	✓	Improved	✓	✓
SQL Server Reporting Services (SSRS)	✓ <sub>1</sub>	✓ <sub>1</sub>		
Simple Dashboards Creation	✓	✓	✓	

## Usability Enhancements

User Features	Maximizer CRM 12 (Summer 13)	Maximizer CRM 12*	Maximizer CRM 11	Maximizer CRM 10/10.5
Type Ahead in List View	✓ <sub>1</sub>	✓ <sub>1</sub>		
Right Click Contextual Menu in All Modules	Improved	✓ <sub>1</sub>		
Keyboard Navigation in main list view	✓ <sub>1</sub>	✓ <sub>1</sub>		



# Version Comparison



User Features	Maximizer CRM 12 (Summer 13)	Maximizer CRM 12*	Maximizer CRM 11	Maximizer CRM 10/10.5
Easier retrieval of Mobile Access URL	✓ <sub>1</sub>	✓ <sub>1</sub>		
Shortcut for Key Fields Setup	✓ <sub>1</sub>	✓ <sub>1</sub>		
Ability to combine, convert and duplicate entries	New in Summer 2013			
Filters in Activity Tab stored between sessions	New in Summer 2013			
Associate Column Views to Saved Searches and Favorite Lists	✓	✓	✓	
Support for International Time Zones	✓	✓	✓	

## Integrations

User Features	Maximizer CRM 12 (Summer 13)	Maximizer CRM 12*	Maximizer CRM 11	Maximizer CRM 10/10.5
Word Add-In	✓	Enhanced Look & Feel in Winter 2012		
64-bit Word Add-in	✓	New in Winter 2012		
Instant Label & Envelope Merge in Word	✓	New in Winter 2012		
Word Merge	✓	Usability Improved in Winter 2012		
Save Documents to Maximizer entries during Word Merge	✓	New in Winter 2012 <sup>1</sup>		
Save any Word document to Maximizer entries	✓	New in Winter 2012 <sup>1</sup>		
Outlook Add-In	✓	Enhanced Look & Feel	✓	✓

# Version Comparison



User Features	Maximizer CRM 12 (Summer 13)	Maximizer CRM 12*	Maximizer CRM 11	Maximizer CRM 10/10.5
64-bit Outlook Add-In	✓	New in Winter 2012 <sup>1</sup>		
Auto-Save Emails	✓ <sub>1,2</sub>	✓ <sub>1,2</sub>		
Contacts Synchronization between Outlook and Maximizer	✓ <sub>1</sub>	✓ <sub>1</sub>		
Tasks Synchronization between Outlook and Maximizer	New in Summer 2013			
Ability to create task in Maximizer based on email in Outlook	New in Summer 2013			
Saving emails to Maximizer without creating Duplicates	Improved	New in Winter 2012 <sup>1</sup>		
Saving emails to Maximizer Contacts	✓ <sub>1</sub>	✓ <sub>1</sub>		
Saving emails to Maximizer Opportunities	Improved	✓ <sub>1</sub>		
Saving email to Maximizer CS Cases	✓	New in Winter 2012 <sup>1</sup>		
Maximizer and Outlook Calendar Synching	✓ <sub>1</sub>	✓ <sub>1</sub>		



## MaxMobile for Blackberry

User Features	Maximizer CRM 12 (Summer 13)	Maximizer CRM 12*	Maximizer CRM 11	Maximizer CRM 10/10.5
Favorite Lists Support	✓	✓		
Appointment Notifications & Support	✓	✓		
Filters for notes and searches	✓	✓		
Organizing saved searches and favorite lists	✓	✓		
Real time, multi user updates	✓	✓	✓	
Video, voice and image capture to Accounts	✓	✓	✓	
Edit and manage documents	✓	✓	✓	
Maps Integration	✓	✓	✓	
Multi-user appointments	✓	✓	✓	
Integration with Maps	✓	✓	✓	

## OS Support and Additional Features

User Features	Maximizer CRM 12 (Summer 13)	Maximizer CRM 12*	Maximizer CRM 11	Maximizer CRM 10/10.5
Windows 8 Support	✓	New in Winter 2012		
Windows 8 RT Support	New in Summer 2013			
365 (Desktop Version) Support	New in Summer 2013			
Internet Explorer 10 support	✓	New in Winter 2012		
Android 4.0 support for Mobile Access	✓	New in Winter 2012		
iOS 6 support for Mobile Access	✓	New in Winter 2012		
BlackBerry Z10 Support	New in Summer 2013			
All Access Licensing (Windows Desktop, Web and Mobile)	✓	✓	✓	
Optimized Ribbon Style Interface	✓	✓	✓	
Support for Internet Explorer & Firefox	✓	✓	✓	
Improvements to SQL Express Storage Capacity	✓	10GB	4GB	

\* – Maximizer CRM Live automatically updates to the latest features. Maximizer CRM 12 Web Access and Maximizer CRM Live have similar key features

1 – New for Web Access only

2 – Only available in Enterprise Edition and Maximizer CRM Live

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