

What's new in Maximizer CRM 12: Winter 2012

Group and Enterprise Editions



The Winter release of Maximizer CRM 12 continues our commitment to deliver a simple to use CRM with enhanced performance and usability to help increase productivity.

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

The Maximizer CRM 12 Winter 2012 release speaks to this by providing enhancements and new features that makes it easier to access information from your mobile device, and overall access and usability improvements for Web and On Premise.

The improvements and new features introduced in the Maximizer CRM 12 Winter 2012 release continue to improve upon functionality improvements introduced in the Summer 12. Specifically, the ability to view, organise and retrieve key customer information quickly and intuitively is one of the major holistic improvements that users will be able experience upon upgrading.

Address book improvements

Workflow enhancements

The Address Book Entry dialog has been removed. In its place, a Details tab has been added to the Address Book page following pane which provides access to all of the details of the selected Address Book entry. Now all of the information for the selected

Address Book entry is easily accessible from the main Address Book page, eliminating the need for pop-up dialogs in order to view or edit Address Book entry details.

A drop-down menu has also been added next to the details tab providing quick access to contacts related to the selected Company or Individual. These changes enhance the workflow for accessing Address Book entry details and provide a smoother and faster user experience when editing Address Book entries.

Performance and usability improvements

Improvements have been made throughout Maximizer CRM 12 Winter 2012 Web Access to improve the performance and responsiveness of the software to enhance usability.

Usability improvements:

- Details tab view displays contact information instantly without requiring the extra click by the user
- Details tab view in the Hotlist module allowing quick access to contact information.

Performance improvements:

The Details tab view has been optimized for web access
Google Maps Integration

Additional Information:

- Opportunities, customer service and activities following tabs have been added to the following pane in the address book page
- The actions links in the details tab provide quick access to commonly-used functions.

Key Improvements

- Address book
- Mobile access
- Web access
- Microsoft integrations
- Web API
- OS & browser support

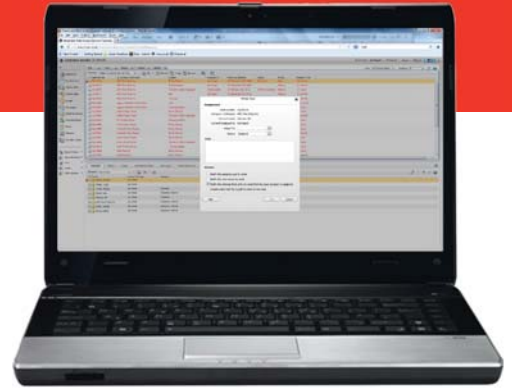
Hotlist enhancements

The details of the address book entry associated with the selected activity are displayed in the following pane details tab allowing you to edit the details of the entry without having to open the address Book page. The opportunities and customer service cases belonging to the associated Address Book entry can also be viewed in their respective following pane tabs.

Quick address book access

- View address book entry contact information in appointments and tasks - Now you can view the contact information of an associated Address book entry from the appointment, hotlist task, and alarm dialogs. The information is displayed in a read-only pop-up, where you can view the entry's contact information, view a map of the entry's address, or perform commonly-used actions like creating a customer service case or scheduling a meeting

Inspire ferocious customer loyalty by effortlessly tracking, escalating, resolving and reassigning support cases to provide a pre-eminent customer experience.



- View address book entry contact information in appointment email reminders - The address, phone numbers, and email addresses of address book entries associated with an appointment are included in the appointment reminder email no longer needing a user to open Maximizer to look up an attendee's contact information
- View in address book from opportunities and customer service pages - You can now select multiple opportunities or cases and retrieve all the associated address book entries in the address book page.

Multi-field value control

- A new control has been created for selecting multi-value fields. The control has a familiar drop-down list appearance and provides a simple checkbox-based interface for selecting items. It also allows you to filter the entries displayed in the list to make it quicker and easier to find specific entries in long lists.

Quick access for saved searches and favorites list

- It is now possible to place shortcuts on the icon bar that allow you to quickly access your commonly used favorite lists or saved searches
- If the shortcut is for a favourite list or saved search in a different module than the current one, Maximizer automatically switches to the appropriate page to display the selected favourite list or saved search
- The quick access shortcuts can be created in the favourite lists or search

catalog dialogs.

Additional features

- Default column setups created for new databases - When a new database is created, a system generated column setup for each module is created. These system generated column setups are available to all new users created in the database, and requires no additional configuration to begin using the product
- Allow label customisation to be applied per user - label customisations can now be applied on a per-user basis in a single database. This means that when User A logs in, she can see one customisation (e.g.: French), whereas when User B logs in, she might see another customisation (e.g.: Spanish).

Maximizer mobile access enhancements and new features

The Maximizer CRM 12 Winter 2012 release now gives users greater access to features and expanded search capabilities optimised for the latest mobile platform technologies.

- Search for case number in customer service screen - It is now possible to search for customer service cases by case number
- Support more searches in address book screen - the search for address book basic fields now includes city/town, state/province, and zip/postal code
- Persistent filters for notes and

documents - the settings for filtering notes and documents, including date range, type, and category, are remembered across sessions

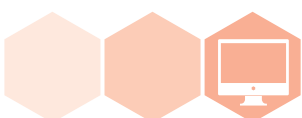
- View address book entry contact information in appointment email reminders - the address, phone numbers, and email addresses of address book entries associated with an appointment are included in the appointment reminder email so users no longer have to open Maximizer to look up an attendee's contact information
- Complete appointments and tasks quickly - in the calendar/hotlist screen users can complete an appointment or a task quickly by swiping the row
- Automatic logon - once a user ID and password is saved, the login page is skipped, allowing users to start using mobile access more quickly.

Microsoft Office® integrations and add-ins

Continued efforts have been made to greatly improve and enhance workflow between the Maximizer CRM 12 Winter 2012 release and Microsoft Office, particular with Microsoft Word® and Microsoft Outlook®.

Microsoft Word add-in for Maximizer Windows access

Print labels and envelope instant merge fields - The Microsoft Word Add-in for Maximizer CRM now supports creating envelopes and mailing labels for the current entry in Maximizer or for multiple



Integrate, completely with
Microsoft applications like
Outlook and Word with Maximizer
CRM 12 Winter 2012.



selected entries. The envelopes and labels are automatically formatted with the name and address of the Maximizer contact.

Usability improvements

Improvements have been made to improve usability of the Microsoft Word Add-in for Maximizer CRM:

- The commands for the Add-in are now located in the Maximizer tab in the Microsoft Word ribbon to make them easier to identify
- The insert merge field dialog now allows insertion of multiple merge fields at once, eliminating the need to re-open the dialog for each merge field, and speeding up the process of authoring documents containing many merge fields.

Microsoft Word add-in for Maximizer web access

- Improved printing functionality for merged Word document - Maximizer CRM web access Word Add-in supports sending a Microsoft Word document to the printer, automatically merging the document with entries in Maximizer. When you send the document, you can choose to merge the document with the current entry or with all selected entries in Maximizer. Now you can also save the document to all entries included in the merge
- Save Word documents to Maximizer entries - Maximizer CRM web access Word Add-in now supports saving a Microsoft Word document to

the current entry in Maximizer or to multiple selected entries. The document is saved to the documents tab of the entries

- Print labels and envelopes - Maximizer CRM web access Word Add-in now supports creating envelopes and mailing labels for the current entry in Maximizer or for multiple selected entries. The envelopes and labels are automatically formatted with the name and address of the Maximizer contact.

Usability improvements

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- The Insert merge field dialog now allows insertion of multiple merge fields at once eliminating the need to re-open the dialog for each merge field speeding up the process of authoring documents containing multiple merge fields
- The 'Previous' and 'Next' buttons now allow navigation between address book entries in the Maximizer CRM web access list when previewing a merged document.

Microsoft Outlook add-in for Maximizer CRM web access

- Save email to customer service cases - clicking the "Save to Case" option now displays a list of cases based on the

current email's "From" address. If the desired case is not in the initial list, a search option is available to find the desired case

- Duplicate emails not saved - if an email has already been saved to an entry in Maximizer, it will not be saved again and create a duplicated email.

64-bit Office add-in for Maximizer CRM

- Microsoft Word Add-in (64-bit) works for both Windows and web access
- Microsoft Outlook Add-in (64-bit) works for Maximizer CRM web access.

Maximizer CRM web Application Programming Interface (API)

Maximizer CRM web data access API

The Maximizer CRM web data access API is a web service API that allows third party developers to access Maximizer CRM address book data across a network over Hyper Text Transfer Protocol (HTTP). The API methods are accessible via both Simple Object Access Protocol (SOAP)/ Extensible Markup Language (XML) and Javascript Object Notation (JSON) endpoints allowing developers to access the API from server-side applications, client-side Javascript applications using Asynchronous Javascript and XML (AJAX), or even lightweight mobile applications via XML HTTP Request (XHR).

Access more functionality than ever before whilst on the move with Maximizer CRM 12 Winter 2012



The web data access API currently supports the following: (Note - additional functionality will be added progressively in future releases).

- Search for Address Book entries, notes, and documents
- Create, read, modify, and delete Address Book entries, including access to both basic and user-defined fields
- Create, read, modify, and delete notes
- View and download documents.

Maximizer CRM web following grid integration framework

The Maximizer CRM web following grid integration framework allows application developers and business partners to create custom

integrations within Maximizer CRM web access. Using the following grid integration framework, developers can create their own custom following tabs to be displayed in the address book, opportunities, customer service, campaigns, or hotlist pages in web access.

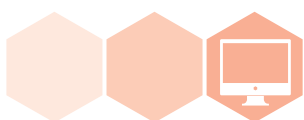
The following grid integration framework currently supports the following:

- Display a grid populated with data supplied by a custom web service created by the developer
- Display a view bar menu containing custom widgets that trigger events defined by the developer
- Display dialogs and perform other actions in response to user input
- Integrate with the Maximizer CRM web data access API to use Maximizer data in the custom tab.

Operating System (OS) and browser support

The following operating systems (OS) and browsers are now supported in the Maximizer CRM 12 Winter 2012 release:

- Windows 8 support
- Internet Explorer 10 support
- Android 4.0 support for mobile access
- iOS 6 support for mobile access.





About Maximizer Software

Maximizer Software delivers Customer Relationship Management (CRM) software and professional services to meet the needs, budgets and access requirements of entrepreneurs, small and medium businesses and divisions of large enterprises.

Simple, easy to use and affordable, Maximizer CRM enables companies to mobilise their workforces through all-access web, smart phone, tablet and desktop delivery methods. Easily configurable for organisations in any industry, Maximizer CRM optimises sales processes, enhances marketing initiatives and improves customer service to ultimately boost productivity and revenue.

With headquarters in Canada and offices and business partners worldwide, Maximizer Software has sold over one million licenses to more than 120,000 customers since 1987.

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Technology Partners



Maximizer CRM

Maximizer CRM helps small and medium-sized businesses maximize their marketing, sales, customer satisfaction capabilities and enhance their productivity and efficiency through the optimisation of what resources they have.

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