

Maximizer CRM Group Edition



Full featured and affordable CRM for small to medium sized enterprises

Maximizer CRM Group Edition is a full-featured CRM software solution that enables teams of up to ten users to work together to attract more prospects, win new customers and improve customer satisfaction.

Group Edition has all the sales, marketing and customer service features to help teams effectively sell to, market to and service customers. It features account and contact managements, sales opportunity management and forecasting, marketing automation (including built-in email marketing) and customer service and support management. Group Edition now offers all the access options: Windows desktop, remote synchronisation, web, and mobile access so you can utilise your CRM solution - anywhere, any time.

Designed for small business, Maximizer CRM Group Edition offers unprecedented deployment time with a database powered by Microsoft SQL Express - offering seamless installation, zero administration and enough power to meet the needs of the most demanding of small businesses.

Maximizer CRM Group Edition features:

- Account & Contact Management including time management, task management, email management, communications & Office integration, Outlook & Exchange synchronisation¹ document management

- Sales: including sales force automation, opportunity management, lead management, sales forecasting, territory management, quote management, partner relationship management²
- Marketing: including marketing automation, email marketing and full campaign manager
- Customer Service & Support: including case management, customer self-service³, Knowledge Base, and computer telephony integration (CTI)
- Business intelligence: including reports via Crystal reports⁴ and SQL Server Reporting Services (SSRS), and customisable real-time dashboards
- Automation: automate basic tasks in all modules with the ability to add-on extra automations if necessary with Workflow Automation⁵
- Customisation & integration: tailor your system, simply and easily to make CRM work for your unique business processes.

Maximizer CRM Group Edition provides true real-time collaboration and business intelligence for the most demanding of growing, medium-sized enterprises.

Key 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.

1. Exchange synchronisation requires MaxSync add-on product with additional fees.

2. Partner Relationship Management requires add-on Partner Web Access licenses.

3. Customer self-service requires add-on Customer Web Access licenses.

4. Custom reporting provided through add-on licenses of Crystal Reports.

5. Workflow Automation powered by KnowledgeSync is an add-on product with additional license fees.

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 **Maximizer**TM
Simply Successful **CRM**

Access your CRM system via almost any mobile device and benefit from comprehensive CRM functionality on the move.



Compare Maximizer CRM® Editions

Deployment options		On-premise			Cloud based
User features		Entrepreneur Edition	Group Edition	Enterprise Edition	Partner Hosted ¹
General	Who it's for	Contact Manager for entrepreneurs and small businesses	Full-featured CRM for small businesses	Advanced CRM for medium-sized businesses and divisions of large corporations	Advanced CRM for anywhere access in the cloud - no setup required
	Minimum # of Users	1	1	1	1
	Maximum # of Users	5	10	Unlimited	Unlimited
	Software Assurance ²	Included	Included	Included	Included
Access options	Windows Desktop Access	✓	✓	✓	
	Web Access		✓	✓	✓
	Mobile Access for smartphones (including iPhone®, Android®, Samsung® and BlackBerry®)		✓	✓	✓
	Mobile Access for tablets (including iPad®, Android®, Samsung® and Blackberry® Playbook)		✓	✓	✓
	MaxMobile CRM for BlackBerry®	Add-on	✓	✓	
	Offline Access (Remote Synchronisation)			✓	
Sales	Sales Force Automation	✓	✓	✓	✓
	Sales forecasting	✓	✓	✓	✓
	Sales Executive Dashboard		✓	✓	✓
	Sales funnel reports		✓	✓	✓
	Lead management and routing		✓	✓	✓
	Opportunity management	Basic	Team and Individual	Team and Individual	✓
	Opportunity monitoring (alerts)		✓	✓	✓
	Sales Action Plan (project management)	✓	✓	✓	✓
	Territory management			✓	✓
Sales Quota Management			✓	✓	

1. Included features and abilities may change depending on partner
2. Software Assurance included for one full year. Renewal fee after one year at 20% of licence MSRP.



Achieve more on the web than ever before with comprehensive upgrades to Maximizer's web access in Winter 2012.



Deployment options		On-premise			Cloud based
User features		Entrepreneur Edition	Group Edition	Enterprise Edition	Partner Hosted ¹
Sales	Sales Strategies & Process Methodology		✓	✓	✓
	Interactive Organisational charts	✓	✓	✓	
	Quote management		✓	✓	
	Real-time alerts including lead status alerts, changed forecast, won/lost deals*		Add-on	Add-on	
	Partner Relationship Management (Partner Web Portal)		Add-on	Add-on	
Marketing	Mass Emailing	✓	✓	✓	✓
	Customer Segmentation	✓	✓	✓	✓
	Customer List Management	✓	✓		
	Web Lead Capture		✓	✓	✓
	Automated Email Campaigns		✓	✓	✓
	Marketing Automation & Campaign Management		✓	✓	✓
	Manage Respondent Lists (which customers received, opened, bounced, URLs clicked, etc.)		✓	✓	✓
	Campaign ROI calculator		✓	✓	✓
	Do-Not-Solicit options			✓	✓
	Email Campaign Metrics (total sent, received, opened, etc.)		✓	✓	✓
	Email Monitoring and automated replies*		Add-on	Add-on	
	Real-time alerts, including lead status alerts, suspended and late campaigns		Add-on	Add-on	
	System monitoring of user unsubscribes*		Add-on	Add-on	

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* Requires Workflow Automation powered by KnowledgeSync. Additional licence fees apply.

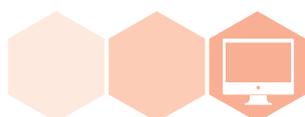
Build your own custom key performance indicators with Maximizer CRM dashboards, to gain instant insight into what matters to your business.



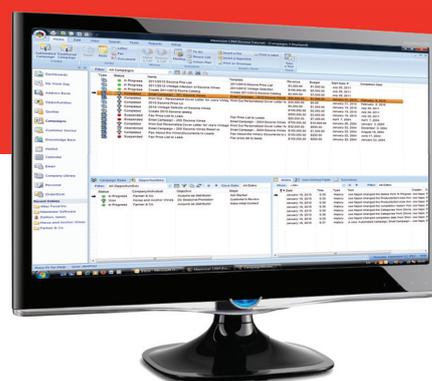
Deployment options		On-premise			Cloud based
User features		Entrepreneur Edition	Group Edition	Enterprise Edition	Partner Hosted ¹
Customer Service and support	Customer Service Case Management (Routing, Queuing, agent workloads, alerts)		✓	✓	✓
	Customer Service Cases, billing, queue reports		✓	✓	✓
	Customer Service Executive Dashboard		✓	✓	✓
	Automatic Case creation via incoming email		✓	✓	✓
	Service billing		✓	✓	✓
	Automated Case monitoring and alerts		✓	✓	✓
	Knowledge base for storing common cases and resolutions		✓	✓	✓
	Real-time alerts (out-of-the-box) include case overload, overdue cases, and status changes *		Add-on	Add-on	
	Advanced monitoring and automatic replies*		Add-on	Add-on	
Customer self-service web portal		Add-on	Add-on		
Business productivity	Customer timeline (at a glance history of all communications)		✓	✓	✓
	Email, letter, fax templates with merge fields	✓	✓	✓	✓
	Customisable mandatory fields	✓	✓	✓	✓
	Unlimited column views (column setups)	✓	✓	✓	✓

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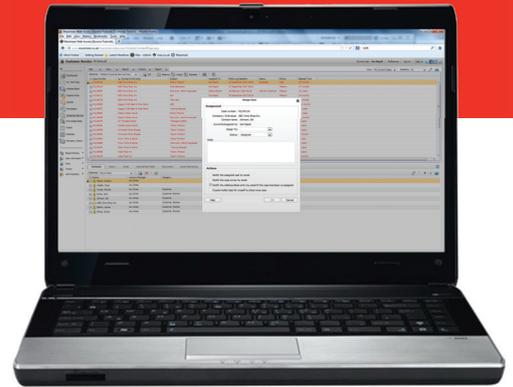
Monitor opportunities and sales metrics to effectively manage and trigger next steps seamlessly.



Deployment options		On-premise			Cloud based
User features		Entrepreneur Edition	Group Edition	Enterprise Edition	Partner Hosted ¹
Business productivity	Efficient selection of individual or teams' customisation settings (saved searches, column setups, favourite lists)	✓	✓	✓	✓
	Photos for accounts and users	✓	✓	✓	✓
	Social media integrations through hyperlink documents and LinkedIn ³	✓	✓	✓	✓
	Multi-user calendar	✓	✓	✓	✓
	Task management	✓	✓	✓	✓
	Document management	✓	✓	✓	✓
	Unlimited notes and documents with each account	✓	✓	✓	✓
	Advanced searching and list building	✓	✓	✓	✓
	Duplicate record checking	✓	✓	✓	✓
	Mass editing of records	✓	✓	✓	✓
	Customer and prospect action plans	✓	✓	✓	✓
	Customisable home page (My work day)	✓	✓	✓	✓
	Data import/export (CSV, XLS and other standard formats)	✓	Simplified import from MS Outlook	Simplified import from MS Outlook	Simplified import from MS Outlook
	CTI (Computer Telephony Integration)	✓	✓	✓	✓
BI	Built in and customisable dashboards		✓	✓	✓
	Crystal Reports	✓	✓	✓	
	SQL Reports (SSRS)		✓	✓	
	Web reports		✓	✓	✓

1. Included features and abilities may change depending on partner
 3. Requires LinkedIn premium subscription.

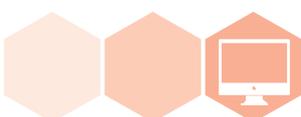
Inspire ferocious customer loyalty by effortlessly tracking, escalating, resolving and reassigning support cases to provide a pre-eminent customer experience.



Deployment options		On-premise			Cloud based
User features		Entrepreneur Edition	Group Edition	Enterprise Edition	Partner Hosted ¹
Administration	Customisation Suite		Add-on	✓	
	Meta data customisations	✓	✓	✓	✓
	Full and read-only access settings		✓	✓	
	Field-level security	✓	✓	✓	✓
	Role-based security groups	✓	✓	✓	✓
	Administrator controlled live updates for installations		✓	✓	Automatic
	Windows authentication for SQL Server	✓	✓	✓	
	Database Server	SQL Express	SQL Express	SQL Server	SQL Azure
MS integration	MS Outlook	✓	✓	Advanced ⁴	Advanced
	MS Word	✓	✓	✓	✓
	MS Excel	✓	✓	✓	✓
	MS Sharepoint ⁵		✓	✓	
	MS Exchange server (MaxSync)		Add-on	Add-on	

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 4. Enterprise edition integration includes the ability to auto-save and track emails

5. Requires Customisation Suite
 * Requires Workflow Automation powered by KnowledgeSync. Additional licence fees apply.





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.

Certified Solution Provider



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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.

Why Maximizer CRM?

- Simple & quick to deploy, use and maintain
- Flexible access options through web, desktop and mobile devices
- Value for money with low total cost of ownership and monthly subscription models
- Expertise as a leader in pioneering CRM development, with more than 20 years experience.

Visit www.max.co.uk for:

- A test drive of the latest release
- Information on how CRM can support your role
- Tools and eBooks
- Resources and information on Cloud based CRM
- An overview of technology and features
- Online demos and features
- White papers and webinars on CRM best practices.

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