



Maximizer CRM Feature Comparison

WHICH IS RIGHT FOR YOUR ORGANIZATION?

For over 25 years Maximizer has been developing CRM software to help businesses grow and build lasting competitive advantage. We believe our singular focus on CRM software, combined with unmatched expertise in solving unique business challenges, makes Maximizer the ideal fit for your organization. Maximizer CRM is available with on-premise and cloud installations. Below is a detailed feature comparison.

Compare Maximizer CRM Editions

CLOUD

ON PREMISE

Access Options

Mobile Access for Smartphones <i>(iPhone, Android and Blackberry)</i>	●	●
Mobile Access for Tablets <i>(iPad, Android, and Blackberry Playbook)</i>	●	●

Sales

Sales Force Automation	●	●
Sales Forecasting	●	●
Sales Executive Dashboards	●	●
Sales Funnel Reports	●	●
Leads Management and Routing	●	●
Opportunity Management	●	●
Opportunity Monitoring <i>(Alerts)</i>	●	●
Sales Action Plan <i>(Project Management)</i>	●	●
Territory Management	●	●
Sales Quota Management	●	●

Marketing

Mass Emailing	●	●
Customer Segmentation	●	●
Customer List Management	●	●
Web Lead Capture	●	●
Automated Email Campaigns	●	●

CLOUD

ON PREMISE

Marketing Automation & Campaign Management	●	●
Manage Respondent Lists <i>(Which Customers Received, Opened, Bounced, URLs Clicked, etc.)</i>	●	●
Campaign ROI Calculator	●	●
Do-Not-Solicit Options <i>(With anti-spam functionality)</i>	●	●
Email Campaign Metrics <i>(Total Sent, Received, Opened, etc.)</i>	●	●

Customer Service & Support

Customer Service Case Management <i>(Routing, Queuing, Agent Workloads, Alerts)</i>	●	●
Customer Service Cases, Billing, Queue Reports	●	●
Customer Service Executive Dashboards	●	●
Automatic Case Creation via Incoming Email	●	●
Service Billing	●	●
Automated Case Monitoring & Alerts	●	●
Knowledge Base for Storing Common Cases and Resolutions	●	●

Business Productivity

Customer Timeline <i>(At a Glance History of All Communications)</i>	●	●
Email, Letter, Fax Templates with Merge Fields	●	●
Built-in Templates for Email and Campaigns <i>(Pre-built formatting, merge fields, links for CASL)</i>	●	●
Unlimited Custom Fields <i>(User-Defined Fields)</i>	●	●
Customizable Mandatory Fields	●	●
Unlimited Column Views <i>(Column Setups)</i>	●	●
Efficient Selection of Individual or Teams' Customization Settings <i>(Saved Searches, Column Setups, Favorite Lists)</i>	●	●
Photos for Accounts and Users	●	●
Multi-User Calendar	●	●
Task Management	●	●
Document Management	●	●
Unlimited Notes and Documents with Each Account	●	●
Advanced Searching and List Building	●	●
Duplicate Recording Checking	●	●
Mass Editing of Records	●	●
Customer and Prospect Action Plans	●	●
Customizable Home Page <i>(My Work Day)</i>	●	●
Data Import/Export <i>(CSV, XLS & Other Standard Formats)</i>	●	●
CTI <i>(Computer Telephony Integration)</i>		●

Business Intelligence

Built-in and Customizable Dashboards	●	●
Crystal Reports		●
SQL Reports (SSRS)		●
Web Reports	●	●
Excel Reports	●	●

Customizations, Architecture, Security & Administration

Meta Data Customizations		●
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		●
Auditing	●	●

Microsoft Products Support & Integration

MS Outlook	●	●
MS Word	●	●
MS Excel	●	●
MS SharePoint		●



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