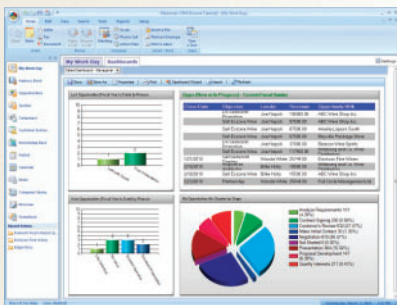


Which is right for you?

“Maximizer CRM 11 will fulfill our goal of using one turn-key system to comprehensively manage sales, marketing and customer service efforts.”

Zina Oster
Pacific Northwest Territory Manager
Colonial Life



Wizard-Driven Dashboards: Easy to set up and modify, key performance indicators provide real-time insight into your business.

Maximizer™ CRM Editions

Small business owners and individual entrepreneurs constantly need to multi-task, from prospecting and closing sales to building customer loyalty. Maximize your time, target the right prospects, and increase sales with Maximizer CRM Entrepreneur Edition — the simple, accessible, high-value sales and contact management for entrepreneurs and small businesses with up to five users. It installs quickly and is easy to configure to your unique business requirements. Manage your account and contact information, create effective sales communications, schedule appointments and tasks, and track sales opportunities — in the office or on the road with your BlackBerry®. Entrepreneur Edition also integrates with QuickBooks®. For sales-focused small to medium-sized businesses, Team Edition provides additional Sales Opportunity Management features enabling collaboration on sales deals by creating Sales Teams within Maximizer CRM to focus on assigned deals.

As your business grows, so does your need for more advanced features and functionality. In addition to contact and time management, Maximizer CRM seamlessly integrates Sales, Marketing and Customer Service & Support to help you and your team work efficiently. Plus, All Access licensing offers unparalleled convenience and access to your critical customer information through your Windows Desktop, a Web browser and your mobile smartphone. Maximizer CRM delivers a complete, robust solution — when and where you need it. Increase your level of productivity, performance and profitability by leveraging its intelligent features and advanced functionality including:

- Account and contact management
- Time management
- Task management & automation
- Sales force automation & forecasting
- Lead management
- Advanced reporting & dashboard metrics
- Sales opportunity management & monitoring
- Territory management
- Marketing automation & email campaigns
- Customer service & support management
- Outlook® & Exchange synchronization
- Accounting integration (Intuit QuickBooks®, Microsoft® Dynamics GP)
- Partner relationship management
- Customer self-service
- Workflow automation

Compare Maximizer CRM Editions

USER FEATURES	Maximizer CRM Editions			
	Enterprise Edition	Group Edition	Team Edition	Entrepreneur Edition
Who it's for	Advanced CRM for medium-sized businesses	Full-featured CRM for small businesses	Sales-focused Contact Manager for small to medium-sized businesses	Contact Manager for entrepreneurs & small businesses
Minimum # of Users	5	1	5	1
Maximum # of Users	Unlimited	10	50	5
Maintenance (Technical support & upgrade assurance) ¹	Included	Included	Included	Optional
Access Options				
CRM for iPhone, Windows Mobile, Google Android, Nokia	Wireless Access	Wireless Access		
MaxMobile for BlackBerry®	✓	✓	✓	✓ ²
Web Access (including Firefox support)	✓	✓		
Windows Desktop Access	✓	✓	✓	✓
Remote Synchronization	✓	✓		
MaxMobile Wireless Access	✓	✓		
Sales				
Sales Force Automation	Advanced ³	Standard	Basic	Basic
Sales Executive Dashboard	✓	✓		
Sales funnel reports	✓	✓	✓	✓
Lead Summary reports	✓	✓		
Opportunity Management	Team and Individual	Team and Individual	Team and Individual	Basic
Opportunity Monitoring (alerts)	✓	✓		
Sales Quota Management	✓			
Sales Action Plan (Project Management)	✓	✓	✓	✓
Email templates with merge fields	✓	✓	✓	✓
Territory Management	✓			
Real-time alerts (out-of-the-box) include lead status alerts, changed forecast, and won/lost deals*	✓	✓		
Account Management	✓	✓	✓	✓
Interactive organizational charts	✓	✓		
Quote Management	✓	✓		
Partner Relationship Management	Add-on	Add-on		
Lead management and routing	✓	✓		
Sales forecasting	✓	✓		
Sales process methodology	✓	✓		
Marketing				
Automated email campaigns	✓	✓		
Automated fax and print campaigns	✓			
Campaign management	✓	✓		
Marketing Automation	✓	✓		
Email campaign respondent lists	✓	✓		
Campaign ROI calculator	✓	✓		
Lead Summary reports	✓	✓		

1 Maintenance included for one full year. Renewal fee after one year at 20% of license MSRP.

2 MaxMobile is included with Team Edition. MaxMobile is an add-on product for Entrepreneur Edition with additional license fees. MaxMobile requires wireless server hardware and Microsoft® Internet Information Services (IIS)

3 Advanced Sales Force Automation features include Territory Management and advanced Workflow events.

USER FEATURES	Maximizer CRM Editions			
	Enterprise Edition	Group Edition	Team Edition	Entrepreneur Edition
Marketing Action Plans (project management)	✓	✓		
Automatic campaign subscriber removal*	✓	✓		
Real-time alerts (out-of-the-box) include lead status alerts, suspended & late campaigns*	✓	✓		
Do-not-solicit enforced by system	✓	✓		
Email monitoring and automatic replies*	✓	✓		
Campaign failure alerts	✓	✓		
Web lead capture	✓	✓		
Customer segmenting with user-defined fields	✓	✓	✓	✓
List management	✓	✓	✓	✓
Customer Service & Support				
Customer Service	Advanced ⁴	Standard		
Customer Service Executive Dashboard	✓	✓		
Overdue case, case billing, other reports	✓	✓		
Case creation based on incoming email	✓	✓		
Case management (routing, queuing)	✓	✓		
Case resolution	✓	✓		
Knowledge Base	✓	✓		
Real-time alerts (out-of-the-box) include case overload, overdue cases, and status changes*	✓	✓		
Email monitoring and automatic replies*	✓	✓		
Service billing	✓	✓		
Customer self-service	Add-on	Add-on		
Business Productivity				
Customer & Prospect Action Plans	✓	✓	✓	✓
My Work Day (customizable home page)	Advanced	Advanced	Standard	Standard
Email, tasks and calendar integration with Outlook®	✓	✓	✓	✓
Email, tasks and calendar integration with Exchange Server	Add-on	Add-on		
Email templates with merge fields	✓	✓	✓	✓
Maximizer toolbar in Outlook®	✓	✓	✓	✓
Import/export in standard formats	✓	✓	✓	✓
Support for HTML email	✓	✓	✓	✓
Industry Packs for High-Tech, Legal, Financial, Real Estate	✓	✓	✓	✓
Accounting Link for Dynamics GP™ (formerly Great Plains)	Add-on	Add-on		
Accounting Link for QuickBooks®	Add-on	Add-on	Add-on	Add-on
Key user-defined fields	✓	✓	✓	✓
Categorized and multi-level user-defined fields	✓	✓	✓	✓
Mandatory fields	✓	✓	✓	✓
Database searching with multiple criteria	✓	✓	✓	✓
Duplicate record checking	✓	✓	✓	✓

4 Advanced Customer Service & Support Management module includes advanced Workflow events.

USER FEATURES	Maximizer CRM Editions			
	Enterprise Edition	Group Edition	Team Edition	Entrepreneur Edition
Calendar with product/category tracking	✓	✓	✓	✓
Calendar for multi-user collaboration	✓	✓	✓	✓
Calendar with resource & location management	✓	✓	✓	✓
CTI (Computer Telephony) integration	✓	✓	✓	✓
Task management	✓	✓	✓	✓
Account notes	✓	✓	✓	✓
Account documents	✓	✓	✓	✓
Company-wide document sharing	✓	✓	✓	✓
Letters, faxes with merge fields	✓	✓	✓	✓
User configuration of views	✓	✓	✓	✓
Business Intelligence				
Dashboards	✓	✓		
Reports: Crystal	✓	✓	✓	✓
Reports: SQL	✓			
Reports: Web	✓			
Workflow Automation	Add-on	Add-on		
Partner Web Access	Add-on	Add-on		
Customer Web Access	Add-on	Add-on		
Workflow Automation				
Business activity monitoring & alerting*	Add-on	Add-on	Add-on	
Out-of-the-box queries and events to monitor business ⁵	Advanced Event Pak	Standard Event Pak	Standard Event Pak	
Business process automation*	Add-on	Add-on	Add-on	
Automatic report distribution*	Add-on	Add-on	Add-on	
Email monitoring and response*	Add-on	Add-on	Add-on	
Architecture, Security & Administration				
Web services	✓	✓		
Meta data layer through interface customization utility	✓	✓		
Customization Suite	Add-on	Add-on		
Integration with Accounting API	Add-on	Add-on		
Full & read-only access settings	✓	✓	✓	✓
Field-level security	✓	✓	✓	✓
Role-based security groups	✓	✓	✓	✓
Support for Microsoft® SMS for installation	✓	✓	✓	✓
Administrator-controlled Live Update	✓	✓		
128-bit cipher public key encryption	✓	✓		
Administration reports	✓	✓	✓	✓
Record global editing	✓	✓	✓	✓
Windows Authentication Only for SQL Server	✓			
Single sign-on for Windows Desktop Access	✓	✓		
Single sign-on for Web Access	✓			
Database	SQL Server	SQL Express	SQL Server or SQL Express	SQL Express

⁵ Advanced Event Pak includes 116 Queries and 78 Events based on features in Enterprise Edition; Standard Event Pak includes 69 Queries and 29 Events based on features in Group and Team Editions.

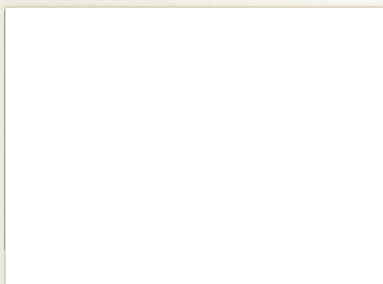
Maximizer CRM 11 Features

- Account and contact management
- Time management
- Task management and automation
- Sales force automation
- Sales forecasting
- Marketing automation
- Email marketing
- Customer service management
- Microsoft Office integration
- Outlook & Exchange synchronization
- Accounting integration
- Business Intelligence
- Workflow automation
- Partner relationship management
- Access options: mobile devices, web, Windows desktop, remote synchronization

Technology Partners



Certified Solution Provider



USER FEATURES	Maximizer CRM Editions			
	Enterprise Edition	Group Edition	Team Edition	Entrepreneur Edition
Microsoft® Technology Support & Integration				
Works with Exchange Server	Add-on	Add-on		
Works with Outlook®	✓	✓	✓	✓
Works with Excel®	✓	✓	✓	✓
Works with Word®	✓	✓	✓	✓
Works with FrontPage®	✓	✓		
Works with SharePoint® 5	✓	✓		
Web Access with Internet Explorer®	✓	✓		
Accounting Link for Dynamics GP™	Add-on	Add-on		
Support for SMS for installation	✓	✓	✓	✓
Built for .NET framework	✓	✓	✓	✓
Integrates with Google® and Bing™ Maps	✓	✓	✓	✓
Support for SQL Server	✓	SQL Express	SQL Express or SQL Server	SQL Express

5 Requires Customization Suite available for Enterprise and Group Editions. Additional license fees apply.

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

Why Maximizer CRM 11?

1. **Simple & quick** to deploy, learn, use and maintain
2. **Access options** through the Web, desktop and mobile smartphones
3. **Value.** Best value for a full-featured CRM, low total cost of ownership.
4. **Expertise.** More than 20 years as a pioneer and leader in CRM.

Visit www.maximizer.com for:

- Information based on your role: sales, marketing, service, executive, IT
- Information on CRM and Contact Management
- An overview of features and technology
- Online demos and free trial software
- White papers and webinars on CRM best practices.

Maximizer CRM helps small and medium-sized businesses maximize sales, customer satisfaction and profitability through increased business productivity and optimization of limited resources.

Maximizer Software
Simply Successful CRM

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