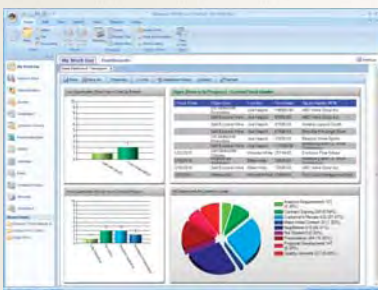


What's New

Maximizer CRM 11

includes new features and key enhancements in the following areas:

- New User Interface
- All Access Licensing
- Business Intelligence
- Business Productivity
- Mobile CRM
- Marketing Automation
- Sales Force Automation
- Web Access



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

Gain critical and timely insight. Strategize effectively. Execute to surpass customer expectations.

Maximizer Software understands your need to rise above the competition – to provide customers with the quality service they demand and to act and respond to a rapidly changing marketplace. With this in mind, we've equipped Maximizer CRM 11 to provide exceptional depth of insight into your business – enabling you to tap into real-time information to make the critical decisions paramount to the success of your business.

With a new, intuitive interface, Maximizer CRM makes working effectively easier than ever. With integrated All Access licenses, leverage unparalleled convenience and access to your critical customer information, through your Windows Desktop, a Web browser and your mobile smartphone. Maximizer CRM 11 delivers a complete, robust solution – when and where you need it. Optimize your level of productivity, performance and profitability with intelligent new features and enhancements that meet the needs across every area of your business.

Executives

Make swift, effective business decisions with instant views of key performance indicators in real-time.

Wizard-Driven Dashboards:

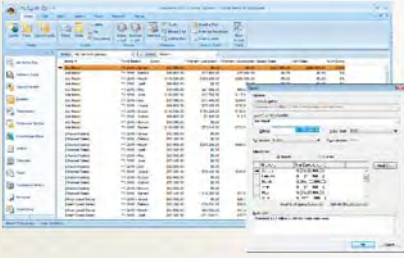
A personalized, instant snapshot of your business

- Save time with quick and seamless setup and modification of dashboards by any user.
- Configure your own dashboards to display key performance indicators in formats of your choice and set up to update as often as needed.
- Enhance your insight further by drilling down to view the data behind the metrics in a detailed list that can be formatted, sorted and exported to Microsoft® Excel®.

Formula User-Defined Fields:

Calculated values for key performance indicators

- Rapidly analyze performance based on metrics automatically derived from existing information.
- Save valuable time spent running reports and set up commonly-used formulas that pull information from other user-defined fields, to produce the specific metrics you need to see.
- Use math, text and date/time functions to obtain a more in-depth profile of contacts, opportunities, service cases and marketing campaigns.
- Quickly determine critical information such as financial values and potential sales opportunities.



Sales Quota Management: At-a-glance view of sales targets and individual and team performance.

Sales

Stay focused on revenue generating activities and opportunities.

Sales Opportunity Monitoring: Clinch top deals and keep priority customers satisfied

- Manage your sales pipeline effectively and increase your close ratio.
- Keep tabs on your biggest deals and most valued customers by staying alerted to important changes in their status.
- Determine what changes you need to be aware of and configure email notifications to be sent when a sales opportunity has been modified.
- Facilitate timely response and collaboration by keeping Account Managers and Partners up-to-date so they can take effective action.

Sales Quota Management: Optimize revenue generation by tracking progress toward targets

- Stay updated on team, territory and individual performance.
- Create powerful quota-based dashboard indicators for results at-a-glance.
- View exactly what you need to see by filtering annually, quarterly, monthly – based on your company's fiscal year.
- Share results through printed reports or quick, one-click export to Microsoft Excel.
- Manage administrative rights to create, view or modify quotas among team members.

Quick Email Templates: Pursue all leads with utmost efficiency

- Merge customer information with quick sales email templates to enable efficient and timely follow-up.
- Leverage merge fields to maximize your productivity by quickly sending personalized, tailored messages to a number of customer records or to a saved list.
- Create your own email templates to use for prospecting, follow-up, welcoming new customers or any other activity.

Marketing

Tap into campaign metrics to optimize sales opportunities in profitable market segments and benefit from the convenience of on-demand campaign management functionality, now available through Web Access.

Online Campaign Manager: Execute campaigns from the convenience of the web

- Provide your marketing team with the option of online access to full marketing campaign functionality, including tracking and robust reporting.

Advanced Marketing Reports: Refine campaigns and target more effectively

- Access marketing reports or export to Microsoft Excel with one click, incorporating the metrics and ratios that enable comprehensive assessments of your campaigns.
- Target your campaigns by retrieving contacts based on a specific response or interest in a specific link.
- Create and modify HTML-based campaign messages using the built-in campaign message editor, featuring a formatting tool bar and support for merge fields and embedded images.



Mobile CRM: Get real-time online access to entire Maximizer CRM database and content.

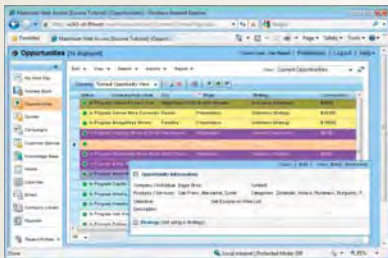
Mobility

- Deploy MaxMobile on your field sales and service staff's BlackBerry® smartphones quicker and easier than ever, for a seamless start.
- Quickly and easily navigate the new tab-based interface for BlackBerry smartphones.
- Get real-time online access to entire Maximizer CRM database content.
- Enable collaboration among team members on the road to set up multi-user appointments, assign tasks, update opportunities, and escalate service cases.
- Work efficiently saving BlackBerry emails with one-click to Maximizer CRM.
- Receive and send automatic email notifications for appointments and task assignments.
- Elevate the level of communications and information kept on record with video, voice and image capture and storage in Maximizer CRM.
- Plan your optimal day of appointments and activities by mapping multiple customers to your BlackBerry GPS to get turn-by-turn directions¹.
- Improve productivity in the field by viewing, creating and editing new documents on your BlackBerry.

User Experience

With the CRM power-user in mind, Maximizer CRM 11 has undergone significant improvements to further enable swift response to customers, flexible access to critical information, and action-oriented decisions to drive your business forward. With a new, but still familiar, intuitive interface and improved navigation to yield maximum productivity, Maximizer CRM 11 is delivered to customer-facing staff and decision-making executives alike – wherever, whenever and however you need it.

- Enjoy optimized usability through a modern, intuitive interface that's easy to navigate, especially for those familiar with the Microsoft® Office® suite of products.
- Leverage All Access licensing within your organization to deliver your customer information - when, where and how you need it.
- Share the power of Maximizer CRM with Mac and Linux users within your organization through Web Access support for the Mozilla Firefox 3.5 browser.
- Conditional color highlighting allows you to categorize and prioritize your most important information at a glance, including: clients, sales deals, service cases, tasks and appointments.
- Conditional coloring extends to reports and Microsoft Excel exports.
- Look up Maximizer CRM customer information seamlessly through your Microsoft SharePoint portal².
- Create marketing campaigns and access essential tools and company documents through enhanced Web Access platform, now including full marketing campaign management, action plans and document library.
- Find the most relevant information faster in HTML rich notes for easier viewing, formatting of records and hyperlinking to online information.
- Conduct faster searches and view information the way you want it, by associating specific Column Views to Catalog Searches and Favorite Lists.
- Include external contacts on appointment notifications with support of appointment reminder emails to non-Maximizer users.
- Use the Outlook Add-On for Web Access users to view and save records from Outlook to Maximizer CRM.
- Collaborate with national or international teams with time zone support in appointments and tasks.
- Improvements to SQL Express 4GB limitation.



Conditional color highlighting: Allows you to categorize and prioritize your most important information at a glance.

- Work offline and synchronize to Maximizer CRM in your office with enhanced and simplified MaxExchange distribution configuration.
- Configure Maximizer CRM more easily with streamlined centralized user, security, and group administration and enhanced user and group administration rights assignment.

1. For BlackBerry devices running BlackBerry OS 4.2.1 to 4.6, only BlackBerry Map is supported. Driving directions are not available. For BlackBerry devices running BlackBerry OS 4.7 and later only.

2. Customization Suite required.

Compare Your Version to Maximizer CRM 11

USER FEATURES	Maximizer CRM 11	Maximizer CRM 10.5	Maximizer CRM 10	Maximizer Enterprise 9/9.5	Maximizer Enterprise 8
Sales					
Wizard-driven dashboards	New				
Formula user-defined fields	New				
Sales opportunity monitoring (alerts)	New				
Sales quota management	New				
Merge email templates	New				
Mobile Dashboards through Wireless Web Access	✓	✓			
Dashboard performance	✓	Improved			
Custom dashboard view with drag & drop and choice of various pie charts and graphs	✓	✓			
Direct access to LinkedIn®, Facebook search	✓	✓			
Direct access to Jigsaw® company and contact lists	✓	✓			
Sales Executive Dashboard	✓	✓	Improved	✓	
Sales funnel reports	✓	✓	✓	✓	
Lead Summary reports	✓	✓	✓	✓	
Opportunity analysis & pipeline reports	✓	✓	✓	✓	✓
Sales Action Plans	✓	✓	✓	✓	
Interactive organizational charts	✓	✓	✓	9.5 only	
Opportunity management	✓	✓	✓	✓	✓
Real-time alerts (out-of-the-box) include lead status alerts, changed forecast, and won/lost deals**	✓	✓	More	✓	✓
Account management	✓	✓	✓	✓	✓
Territory management (add-on for Group Edition)	✓	✓	✓		
Quote management	✓	✓	Improved	✓	
Partner Relationship Management	✓	✓	✓	✓	✓
Lead management and routing	✓	✓	✓	✓	✓
Sales forecasting	✓	✓	✓	✓	✓
Sales process methodology	✓	✓	✓	✓	✓
Marketing					
Online access to Campaign Manager	New				
Advanced marketing reports	New				
Multiple landing page tracking	✓	✓			
Email templates in web access	✓	✓			
Email campaign respondent lists	✓	✓	✓	✓	
Campaign ROI calculator	✓	✓	✓	✓	
Lead Summary reports	✓	✓	Improved	✓	
Marketing Action Plans (project management)	✓	✓	✓	✓	

USER FEATURES	Maximizer CRM 11	Maximizer CRM 10.5	Maximizer CRM 10	Maximizer Enterprise 9/9.5	Maximizer Enterprise 8
Automatic campaign subscriber removal**	✓	✓	✓	✓	
Real-time alerts (out-of-the-box) include lead status alerts, suspended & late campaigns.**	✓	✓	More	✓	✓
Automated email campaigns	✓	✓	✓	✓	✓
Automated fax and print campaigns	✓	✓	✓	✓	✓
Campaign management	✓	✓	✓	✓	✓
Campaign response metrics	✓	✓	Improved	✓	✓
Do-not-solicit enforced by system	✓	✓	✓	✓	✓
Email monitoring and automatic replies**	✓	✓	✓	✓	✓
Campaign failure alerts	✓	✓	✓	✓	✓
Lead capture from website	✓	✓	Improved	✓	✓
Customer segmenting with user fields	✓	✓	✓	✓	✓
List management	✓	✓	✓	✓	✓
Customer Service & Support					
Case creation based on incoming email	✓	Improved	✓	✓	
Customer Service Executive Dashboard	✓	✓	✓	✓	
Overdue case, case billing, other reports	✓	✓	✓	✓	
Case management (routing, queuing)	✓	✓	✓	Improved	✓
Case resolution	✓	✓	✓	Improved	✓
Knowledge Base (add-on for Group Edition)	✓	✓	✓	Improved	✓
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	✓	✓	✓	✓	✓
Mobile CRM					
Tab-based interface	New				
Multi-user support	New				
Email notifications for appointments and tasks	New				
Support for video, voice and image capture and storage to records	New				
Integration with BlackBerry GPS and multi-location maps	New				
Integration with BlackBerry and Google maps	✓	✓			
View, editing and creation of documents	New				
Support for BlackBerry	✓	✓			
Support for iPhone, Windows Mobile, Nokia (Symbian OS) and Android (Wireless Access only)	✓	✓			
Mobile Dashboards	✓	✓	✓	✓	
Integration with BlackBerry email	✓	✓			
Integration with BlackBerry address book and phone	✓	✓			
Wireless/remote deployment for BlackBerry	✓	✓			
One-click access to maps and directions	✓	✓			
Phone / email / SMS logging	✓	✓			
Online document library	✓	✓			
Customer service case management	✓	✓			
BlackBerry Access (MaxMobile)	✓	✓	✓		

USER FEATURES	Maximizer CRM 11	Maximizer CRM 10.5	Maximizer CRM 10	Maximizer Enterprise 9/9.5	Maximizer Enterprise 8
Wireless Access view / search	✓	Improved	✓	✓	✓
Palm synchronization		✓	✓	✓	✓
Web Access					
Full marketing campaign functionality*	New				
Access to document library	New				
Outlook Add-On for viewing and saving records from Microsoft Outlook	New				
Column Reporting	New				
Action Plans	✓	✓			
Call logging	✓	✓			
Global editing & editing records	✓	✓			
Word integration	✓	✓			
Export to Excel	✓	✓			
Email integration, saving	✓	Improved	✓		
Calendar (appointments, groups)	✓	Improved	✓		
Web Access	✓	Improved	✓	✓	✓
Wireless Web Access	✓	Improved	✓	✓	✓
General					
All Access licensing (desktop, web and mobile CRM)	New				
Optimized Ribbon Style interface	New				
Support for Mozilla Firefox 3.5	New				
Conditional color highlighting	New				
Support for Microsoft SharePoint	New				
HTML notes	New				
Associate Column View to Catalog Searches and Favorite Lists	New				
Support for international time zones	New				
Customer & Prospect Action Plans	✓	✓	✓	✓	
My Work Day (customizable home page)	✓	✓	Improved	✓	✓
Email, tasks, calendar integration with Outlook	✓	✓	Improved	✓	✓
Email, tasks, calendar integration with Exchange Server	✓	✓	✓	✓	
Maximizer toolbar in Outlook	✓	✓	Improved	✓	
Import/export in standard formats	✓	✓	✓	✓	✓
Support for HTML email	✓	✓	✓	✓	✓
Industry Packs for High-Tech, Legal, Financial, Real Estate	✓	✓	✓	✓	✓
Accounting Link for Microsoft Dynamics™ GP (formerly Great Plains)	✓	✓	✓		
Accounting Link for QuickBooks®	✓	✓	✓	✓	✓
Key user-defined fields	✓	✓	✓	✓	✓
Categorized and multi-level user-defined fields	✓	✓	✓	✓	✓
Mandatory fields	✓	✓	✓	✓	✓
Database searching with multiple criteria	✓	✓	✓	✓	✓
Duplicate record checking	✓	✓	Improved	✓	✓
Calendar with product/category tracking	✓	✓	Improved		
Calendar for multi-user collaboration	✓	✓	✓	✓	✓
Calendar with resource & location management	✓	✓	✓	✓	✓
CTI (Computer Telephony integration)	✓	✓	✓	✓	✓
Task management	✓	✓	✓	✓	✓

USER FEATURES	Maximizer CRM 11	Maximizer CRM 10.5	Maximizer CRM 10	Maximizer Enterprise 9/9.5	Maximizer Enterprise 8
Account notes	✓	✓	✓	✓	✓
Account documents	✓	✓	✓	✓	✓
Company-wide document sharing	✓	✓	✓	✓	✓
Letters, faxes with merge fields	✓	✓	✓	✓	✓
User configuration of views	✓	✓	Improved	✓	✓
Remote synchronization	✓	Improved	✓	✓	✓
Business Intelligence					
Wizard-driven dashboards	New				
Mobile dashboards	✓	✓			
Executive Dashboard with Key Performance Indicators	✓	✓	Improved	✓	✓
Out-of-the-box, pre-formatted reports (Maximizer, Crystal Reports®, Microsoft SRS)	✓	✓	Improved	✓	✓
Support for Crystal Reports	✓	✓	✓	✓	✓
Support for Crystal Reports Server	✓	✓	✓	✓	
Support for Microsoft SQL Reporting Services (SRS)	✓	✓	✓		
Workflow Automation					
Business activity monitoring & alerting**	✓	✓	More	✓	✓
Business process automation**	✓	✓	✓	✓	✓
Automatic report distribution**	✓	✓	✓	✓	✓
Email monitoring and response**	✓	✓	✓	✓	✓
Order Management					
Quote management	✓	✓	✓		
Order management	✓	✓	Improved	✓	✓
Customer online order tracking	✓	✓	✓	✓	✓
Credit card processing	✓	✓	✓	✓	✓
Product catalog	✓	✓	✓	✓	✓
Architecture, Security & Administration					
Improvements to SQL Express 4GB limitation	New				
Enhanced MaxExchange distribution configuration	New				
Support for 64-bit Microsoft SQL Server® Editions	✓	✓			
Support for 64-bit Microsoft® operating system	✓	✓	✓		
Web services	✓	✓	✓		
Meta data layer through interface customization utility	✓	✓	✓		
Customization Suite	✓	Improved	✓	✓	✓
Accounting integration (QuickBooks®, Dynamics™ GP)	✓	✓	Improved	✓	✓
Integration with accounting API	✓	✓	✓	✓	
Full & Read-Only access settings	✓	✓	Improved	✓	✓
Field-level security	✓	✓	Improved		
Role-based security groups	✓	✓	Improved	✓	✓
Support for Microsoft SMS for installation	✓	✓	✓	✓	
Administrator-controlled Live Update	✓	✓	✓	✓	
128-bit cipher public key encryption	✓	✓	✓	✓	✓
SQL Server database	✓	✓	✓	✓	✓
SQL Server Express database (Maximizer CRM Group Edition only)	✓	✓	✓		
Administration reports	✓	✓	Improved	✓	
Record global editing	✓	✓	Improved	✓	✓

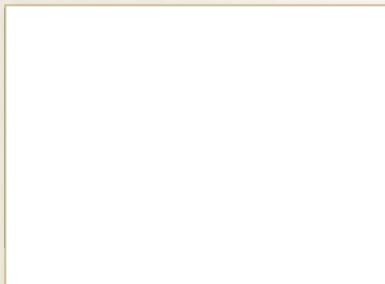
Maximizer CRM 11 Features

- 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 11	Maximizer CRM 10.5	Maximizer CRM 10	Maximizer Enterprise 9/9.5	Maximizer Enterprise 8
Windows Authentication for SQL Server only	✓	✓	✓		
Single sign-on for Windows Desktop Access	✓	✓	Improved	✓	
Single sign-on for Web Access	✓	✓	✓		
Microsoft® Technology Support & Integration					
Outlook Add-On for viewing and saving records from Microsoft Outlook in Web Access	New				
Support for SQL Server Databases	✓	✓	✓	✓	✓
Works with Exchange Server	✓	✓	✓	✓	
Works with Outlook	✓	✓	Improved	✓	✓
Works with Excel	✓	Improved	✓	✓	
Works with Word	✓	✓	✓	✓	✓
Works with FrontPage	✓	✓	✓	✓	✓
Web Access with Internet Explorer	✓	✓	Improved	✓	
Accounting Link for Microsoft® Dynamics™ GP	✓	✓	✓		
CRM Vista Gadgets	✓	✓	✓	✓	
Support for SMS for installation	✓	✓	✓	✓	
Built for .NET framework	✓	✓	Improved	✓	✓

* No template creation.

**Requires Workflow Automation, an add-on product with additional fees.

Visit www.maximizer.com/support for a complete list of supported products.

Contact Maximizer Software to learn how you can mobilize your workforce with Maximizer CRM 11 All Access.

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

Call: **1-800-804-6299**

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