



DATASHEET

Feature Comparison

| MAXIMIZER CRM 2017

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 **MAXIMIZER**CRM

DIFFERENCES BETWEEN MAXIMIZER CRM WINDOWS ACCESS, WEB ACCESS AND CRM LIVE

Updated for Maximizer CRM 2017 R2 release (March 30, 2017).

Windows Access has been discontinued in Maximizer CRM 2017.

Opportunities

User Features	Legacy Windows Access (v2016 or earlier)	On Premise Web Access 2017	CRM Live 2017
View and work with opportunities	●	●	●
Support multiple sales process		●	●
Track stage age and overall opportunity age		●	●
Define mandatory fields in opportunities using rules	●	●	●
Opportunity monitoring	●	●	●
Capture campaign sources for opportunities	●	●	●
Sales quota management	●	●	●
Opportunity Reports	●	●	●
Quick search for opportunities		●	●
Select a company or an individual during the creation of an opportunity		●	●
Work with strategies	●		
Create and manage strategies (Strategy Library)	●		
Dynamic team in opportunities (add/remove team members)	●		

Address Book

User Features	Legacy Windows Access (v2016 or earlier)	On Premise Web Access 2017	CRM Live 2017
View and work with Address Book entries	●	●	●
One-click to view an entry's address in map		●	●
VOIP integration		●	●
Display photo of an Address Book Entry		●	●
Convert individual to a contact of a company		●	●
Move a contact to another company or individual		●	●
Email opt-in profile for each email address		●	●
Define mandatory fields using rules	●	●	●
Check for duplicates during manual creation of a new Address Book entry	●	●	●
Quick Address Book entry Search	●	●	●
Web to lead capture	●	●	●
Access recent entries	●	●	●
Record looking for Address Book entries	●	●	

Customer Service

User Features	Legacy Windows Access (v2016 or earlier)	On Premise Web Access 2017	CRM Live 2017
View and work with Customer cases	●	●	●
Select a company or an individual during creation of a case		●	●
Define mandatory fields in cases using rules		●	●
Quick search of cases		●	●
Case monitoring	●	●	●
Assign/escalate/resolve cases	●	●	●
Notification about the changes of status	●	●	●
Customer Service cases reports	●	●	●

Marketing

Ongoing campaigns	●	●	●
Fixed-date campaigns	●		
Anti-spam functionality		●	●
Email type opt-in preference management		●	●
Campaign ROI management	●	●	●
Campaign template library	●	●	●
Campaign response metrics	●	●	●

Hotlist

User Features	Legacy Windows Access (v2016 or earlier)	On Premise Web Access 2017	CRM Live 2017
Rolling date range filter		●	●
Batch editing task date		●	●
Hide completed activities		●	●
View multiple users' activities at once		●	●
Filter for only showing the tasks created by the login user		●	●
View and work with appointments and tasks	●	●	●
Set alarm for tasks	●	●	●
Assign tasks for other users	●	●	●

Calendar

View appointments and tasks in daily, weekly and monthly views	●	●	●
Availability view that displays free time with colour codes		●	●
All day or multi-day appointments		●	●
Appointment organizer		●	●
Find free time in appointment dialog	●	●	●
Suggestion for the next available time slots		●	●
View other users' calendar	●	●	●
Appointment invitation and reminder	●	●	●
Email templates for appointment invitation and reminder		●	●
Colour codes for users, locations and resources	●	●	●
iCalendar (.ics) support through appointment email notification	●	●	●

Dashboard

User Features	Legacy Windows Access (v2016 or earlier)	On Premise Web Access 2017	CRM Live 2017
Dashboard click through to retrieve all data	●	●	●
Drill down to specific slice of pie or bar graph in dashboards		●	●
Email screenshot of the dashboard to other users		●	●
Support for SQL metrics	●	●	●

Business Productivity and User Experience

Email			
Email templates support merging with Address Book entries, opportunities , cases and user information	●	●	●
Open saved email from entry's documents allow reply/forward message	●	●	●
Email signature	●	●	●
Send emails based on the recipient's opt-in options		●	●
Support email unsubscribe functionality		●	●
Notes and documents			
Document filter that allows selecting multiple types and categories		●	●
Note filter that allows selecting multiple types	●	●	●
Hyperlink documents	●	●	●
Key Fields			
Hide blank Key Fields		●	●
Allow users to modify Key Fields		●	●
Create groups or Key Fields		●	●

User Features	Legacy Windows Access (v2016 or earlier)	On Premise Web Access 2017	CRM Live 2017
Working with entries			
Perform other actions while editing a note		●	●
Global edit	●	●	●
Right-click menu	●	●	●
Type ahead to locate entries	●	●	●
List management (Select all, Invert Selection, Make selected lists current)	●	●	●
Following tabs			
Contact, Opportunities, Notes, Documents, Related Entries, User-Defined Fields	●	●	●
Activities following tab		●	●
History tab		●	●
Auditing tab		●	●
Ability to show/hide following tabs and change the order of the tabs		●	●
Automated Campaigns following tab	●		
Action Plan			
Create, management and apply Action Plans	●	●	●
Task dependencies and sequencing in Action Plans	●	●	●

User Features	Legacy Windows Access (v2016 or earlier)	On Premise Web Access 2017	CRM Live 2017
Others			
Condition based Notifications		●	●
Automatically update the last contact date		●	●
Duration user-defined field for age calculation		●	●
Notification pane to show alarms and notifications for tasks and appointments		●	●
Create default entry/default note	●	●	●
Search functions, including saved search	●	●	●
Provide suggestions while performing quick search		●	●
Favourite List	●	●	●
Associate column views to saved searches and Favourite Lists	●	●	●
Automatically adjust row height to fit all the stacked fields in a column setup view		●	●
In-Product “help” videos		●	●
Order Desk and Quotes	●		
Label customization	●	●	●
Colouring rule	●	●	●

Security and Business Integrations

Email notification about changing password	●	●	●
Disallow login after several failed attempts		●	●
Auditing the changes made in address Book entries, opportunities and cases		●	●
Excel report		●	●
Column report and notes report	●	●	●

Integration

User Features	Legacy Windows Access (v2016 or earlier)	On Premise Web Access 2017	CRM Live 2017
Outlook Add-in			
Track and save email to Maximizer entry		●	●
Save email to Address Book entries	●	●	●
Save emails to opportunities and cases		●	●
Anti-spam functionality		●	●
Option to include attachment or not when saving an email to a Maximizer entry		●	●
Sync appointment, tasks and contacts		●	●
Support 64 bit versions of Outlook		●	●
Word Add-in			
Access document templates stored in Maximizer		●	●
Create or modify document templates stored in Maximizer		●	●
Save document to Maximizer entries		●	●
Print labels and envelopes	●	●	●
Excel			
Create quote using Excel		●	●
Export to Excel	●	●	●
Excel reports		●	●
Maximizer Connect for use with MailChimp			
Sync with MailChimp subscribers		●	●
View MailChimp campaign information in Maximizer		●	●
Maximizer Connect for use with Zapier			
Create Address Book entries, tasks and notes			●
Maximizer Connect for Outlook 365 (Web version)			
Create Address Book entries, tasks and opportunities			●
Maximizer Connect for use with Gmail			
Track Email, Save Attachments, Contact Sync			●

About Maximizer

Maximizer CRM is fueling the growth of businesses around the world.

Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise, our cloud and your cloud deployment options, tailored-to-fit flexibility, state-of-the art security infrastructure, industry-specific editions and anywhere/anytime mobile access, Maximizer is the affordable CRM solution of choice.

From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.



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