



DATASHEET

# Version Comparison

| MAXIMIZER CRM 2017

Published By



## Sales

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12
Support multiple sales processes	●			
Track opportunity stage age	●			
Track overall opportunity age	●			
Monitor progress by comparing stage age with target age	●			
Opportunity auditing	●	● Added in 2016 R2		
Forecast report	●	●		
Opportunity Details following tab	●	●	●	
Define mandatory fields in opportunities using logic and rules	●	●	●	
Work with strategy	Strategy is read-only	●	●	●
Opportunities following tab in Address Book and Hotlist modules	●	●	●	●
Better linkage between contacts and associated account manager	●	●	●	●
Web lead capture	●	●	●	●
Capture campaign sources for leads and opportunities	●	●	●	●
Sales quota management <sup>1</sup>	●	●	●	●
Sales opportunity monitoring	●	●	●	●

## Customer Service

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12
Case Details following tab	●	●		
Customer Service case auditing	●	● Added in 2016 R2		

<sup>1</sup> Only available in Enterprise Edition and Maximizer CRM Live.

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12
Define mandatory fields in cases using logic and rules	●	● Added in 2016 R2		
Pre-defined subjects included in search dialog	●	●	●	●
Customer Service following tab in Address Book and Hotlist modules	●	●	●	●
Web links to Knowledge Base articles	●	●	●	●
Notifications	●	●	●	●

## Marketing

Campaign manager	●	● Improved in 2016 (Performance for adding subscribers)	●	●
Web lead capture	●	●	●	●
Campaign ROI management	●	●	●	●
Automated campaign templates	●	●	●	●
Campaign response metrics	●	●	●	●
Built-in marketing reports	●	●	●	●
Anti-spam functionality	●	●	●	
HTML text editor	●	●	●	●

## Business Productivity

Duration user-defined field for age calculation	●			
Date Last Contacted system field	●			
Automatically update Date Last Contacted field based on rules	●			
Support email template for appointment invitation and reminder	●			

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12
Duration user-defined field for age calculation	●			
Date Last Contacted system field	●			
Automatically update Date Last Contacted field based on rules	●			
Support email template for appointment invitation and reminder	●			
Deletion protection	● Added in 2017 R2			
Appointment invitation and reminder	●	●	●	●
Templates for Word (including templates for invoice, letter, purchase order, quote etc.)	●			
Templates for import (including templates for CSV, tab-delimited and MXI import)	●			
Templates for creating users (including templates for creating sales rep and manager, Customer Service rep and manager, administrator)	●			
Quick search Enhanced to support searching opportunities or cases (2017); provide suggestions (2017 R2)	● Enhanced in 2017 and 2017 R2	●	●	●
<b>Calendar</b>				
Color coded Availability view for find free time	●			
Suggest next available time slots in Availability view	●			
Ability to create task from inside Calendar	●			
Change calendar settings from inside Calendar	●			
Option to keep past appointments when deleting recurring appointments	●			
Ability to print Calendar view	● Enhanced (Supported in all calendar views)	● Monthly view only	● Monthly view only	● Monthly view only

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12
<b>Email</b>				
Enhanced email unsubscribe functionality	●	●	●	
Web form for email preference management	●	●	●	
Email merge fields	●	● Enhanced in 2016 (Allow user fields)	●	●
Automated sending of outgoing emails to different email inboxes	●	●	●	●
Pre-built email and campaign templates	●	●	●	
<b>Notes and Documents</b>				
Allow printing multiple notes at the same time in Notes following tab	●	● Added in 2016 R2		
Notes filter that allows selecting multiple note types	●	●		
Documents filter that allows selecting multiple document types and categories	●	●		
Centralized template library for documents and Excel reports	●	●	●	
Email documents from within the documents tab	●	●	●	
<b>Search</b>				
Ignore year for search date fields by rolling date range	●	●		
Search Address Book entries by partner	●	●		
Retrieve partners of the selected Address Book entries	●	●		
Retrieve all companies/individuals	●	●	●	
Retrieve Address Book entries related to the selected opportunities or Customer Service cases	●	●	●	●
Retrieve opportunities and cases	●	●	●	●
Saved searches can be configured with variables for greater flexibility	●	●	●	●
<b>Address Book Entries</b>				
Address Book contact social media web search	●	●	●	
One click to map from Address Book entry	●	●	●	●
Ability to define mandatory fields in Address Book entries using logic and rules	●	●	●	●

User Features	Maximizer 2017 CRM	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12
<b>Appointments and Tasks</b>				
View multiple users' activities in Hotlist	●	●		
Monitor tasks you have assigned to other users	●	●		
Batch editing task dates	●	●		
Rolling date range in Hotlist	●	●	●	
Unfinished appointments carry forward in Hotlist	●	●	●	
Details tab for contact information in Hotlist module	●	●	●	●
Printing of individual appointments and improved print appointment details report	●	●	●	●
Activities following tab	●	●	● Added Activities tab in other modules	● Added Activities tab in Address Book module
Task dependencies and sequencing in action plan	●	●	●	●
Appointment management with accounts (Non-Maximizer users)	●	●	●	●
<b>Other Improvements</b>				
Move multiple entries from the following tab to the main page at the same time	● Added in 2017 R2			
Action Panel in following tabs (Available in more following tabs, accessing the command when the panel is collapsed.)	● Added in 2017 R2			
Ability to search for a field in User-defined Field following tab	●	● Added in 2016 R2		
Ability to search for a field in various dialog, including advanced search, column setup, merge field, Key Fields and formula user-defined field.	●	● Added in 2016 R2		
Ability to search for a field in Global Edit dialog	● Added in 2017 R2			
Perform other actions while editing a note	●	●		
VOIP integration	●	●	●	
User-defined fields with clickable hyperlinks	●	●	●	●

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12
Quick access for frequently used saved searches and Favorite Lists	● Enhanced in 2017 R2 to allow more icons and groupings	●	●	●
Customer timeline	●	●	●	●
Web links to external documents and social media profiles	●	●	●	●
Notes and emails text editor	●	●	●	●
Context video help	●	● Videos have been updated in 2016 R2	●	●
In-product "help" videos (Hotlists, email, notes and documents, global editing, user management, etc.)	●	● Added in 2016 R2	●	●

## Customizations

Data access web service API	● Enhanced	●	●	●
Web following grid integration framework	●	●	●	●
Search Address Book entries by the fields in custom following tabs	●	● Enhanced in 2016 (User defined fields are supported)	●	
Label customization per user	●	●	●	●
Customizable user profile such as email, address and photo	●	●	●	●
Customize which following windows to display	●	●	●	●
Startup preferences	● Improved (Added start-up option for Opportunities and Customer Service)	●	●	●
Key Fields customization within Web Access	●	●	●	●

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12
Upload photos for Address Book entries	●	●	●	●
Easily switch views between individual or teams' customization settings (Saved searches, column views, Favorite Lists)	●	●	●	●
Coloring rules	●	●	●	●
Duplicate record checking	●	●	●	●
Expanded key fields customizations and display options	●	● Improved (User defined fields are supported)	●	●
Following tab grid (Column width resizing, column sorting, tooltip display for drop-down lists)	●	●	●	●

## Business Intelligence

Condition based Notifications	● Added in 2017 R2			
Pre-built Excel report templates (Address Book, Customer Service, Opportunity, Campaigns and Hotlist)	● Enhanced (Allow selecting column setup for report template)	● Enhanced in 2016 (Added Excel report for Hotlist)	●	
Auditing functionality	●	● Added auditing for opportunities and cases in 2016 R2	●	
Web reports (Sales funnel, users' activity, incoming vs outgoing phone calls, email campaign response metrics, customer service workload reports)	●	●	●	●
Drill down to specific slices of pie and bar graphs in dashboards	●	● Enhanced in 2016 (Respect column setup associated with the saved search)	●	●
Single and multi-value grouping on dashboards	●	●	●	●
Increased number of columns in dashboards list control	●	●	●	●
Share dashboards via email	●	●	●	●
Dashboards	●	●	●	●
SQL server reporting services (SSRS)	● Available in Web Access only	● Available in Web Access only	●	●



User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12
<b>Notification Panel</b>				
Display notifications in toasters	● Added in 2017 R2			
Allow dismiss alarms in Notification panel	●			
Notification panel for alarms and meeting invitations	●	●	●	
Key field list group titles	●	●	●	

## Mobile Access

View another user's calendar; modify or create appointments on behalf of another user.	● Added in 2017 R2			
Support multiple processes when working with opportunities	●			
Display opportunity stage age and overall age	●			
Support duration user-defined field	●			
Automatically update Date Last Contacted based on rules	●			
Support organizer in appointments	●			
Support all day or multi-day appointments	●			
Mobile access for tablets (iPad, Android tablets)	●	●	●	●
Prompt for value when retrieving a saved search	●	●		
Ability to select a predefined subject line for a task or an appointment	●	●		
Show location of an appointment in map	●	●		
Quick Access shortcuts in Home screen	●	●		

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12
Preferences module that defines the startup screen	●	●		
Send email from an opportunity or a case	●	●	●	
Automatic login option for quicker access	●	●	●	●
Quick search	●	●	●	●
Additional search options (By cases, by city, by state and by zip)	●	●	●	●
Customizable column views	●	●	●	●
Open and share documents	●	●	●	●
Create shortcut on device home screen	●	●	●	●
Shortcut to email/call in list view (For smartphones)	●	●	●	●
Multi-user appointments	●	● Enhanced in 2016 (Ability to invite or remove contacts to / from an appointment or)	●	●
Manage Key Fields	●	●	●	●
Send emails	●	● Enhanced in 2016 (Retain contents of an email when the device is disconnected.)	●	●
Manage appointments	●	●	●	●
Mobile dashboards	●	●	●	●
Change the maximum number of entries that can be retrieved	●	● Enhanced in 2016 (The number can be changed in Administrator)	●	●

## Usability Enhancements

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12
<b>List Management</b>				
Automatically adjust row height to fit all the stacked fields in a column setup view	●	●		
Recent column setup views	●	●	●	
Column setup alignment editing	●	●	●	
Type ahead in list view	●	●	●	●
Right click contextual menu in all modules	●	●	●	●
Keyboard navigation in main list view	●	●	●	●
Ability to combine, convert and duplicate entries	●	●	●	●
<b>Key Fields</b>				
Key Field list tooltip descriptions	●	●	●	
Hide blank fields in Key Fields list	●	●	●	
Shortcut for Key Fields setup	●	●	●	●
<b>Other Enhancements</b>				
Upload multiple documents at the same time	●	● Added in 2016 R2		
Support more columns in the dialogs for searching for Address Book entries and in appointment dialog	●	●		
Hide completed activities in Hotlist	●	●	●	
Hidden “following” tab for users without viewing rights	●	●	●	
Support custom address format	●	●	●	
Filters in activity tab stored between sessions	●	●	●	●
Associate column views to saved searches and Favorite Lists	●	●	●	●
Support for international time zones	●	●	●	●

# Integrations

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12
Excel Quote Add-in (for CRM and on premise)	● Added in 2017 R2			
Outlook 365 Add-in (for CRM Live only)	●			
Maximizer Connect for use with Zapier (for CRM Live only)	●	●		
Maximizer Connect for use with MailChimp (for CRM Live only and on premise)	●	●	● Added in 2015 R2	
Maximizer Connect for use with Gmail	●			
Word add-in	●	●	●	●
64-bit Word add-in	●	●	●	●
Instant label and envelope merge in Word	●	●	●	●
Word Merge	●	●	●	●
Access document templates stored in Maximizer in Word add-in	●	●	●	
Create or update Maximizer document templates in Word add-in	●	●	●	
Save documents to Maximizer entries during Word merge	●	●	●	●
Save any Word document to entries	●	●	●	●
Outlook add-in	●	●	●	●
64-bit Outlook add-in	●	●	●	●
Auto-save emails by email conversation	●	●	●	●
Auto-save emails by email address	●	●	●	
Create a note against Maximizer entry when saving an email in Outlook add-in	●	●		
Allow specify name and description for the document when saving an email from Outlook add-in	●	●		

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12
Contacts synchronization between Outlook and Maximizer	●	●	●	●
Tasks Synchronization between Outlook and Maximizer	●	●	●	●
Ability to create task in Maximizer based on email in Outlook	●	●	●	●
Saving emails to Maximizer without creating duplicates	●	●	●	●
Saving emails to Maximizer contacts	●	● Improved in 2016 R2	●	●
Saving emails to Maximizer opportunities	●	●	●	●

## OS Support and Additional Features

Windows 10	●	●		
Windows 8.1	●	●	●	●
Windows 8	●	●	●	●
Windows 8 RT	●	●	●	●
Microsoft Office 365 (Desktop version)	●	●	●	●
Outlook 365 web version	●			
Microsoft Edge browser	●	●		
Internet Explorer 11	●	●	●	●
Internet Explorer 9, 10		● Not supported to work with 2016 R2	●	●
Google Chrome	●	●		
Internet Explorer 8				●

User Features	Maximizer CRM 2017	Maximizer CRM 2016	Maximizer CRM 2015	Maximizer CRM 12
Mozilla FireFox for Windows and Mac	●	●	●	●
Android support for Mobile Access	●	● Support up to 6.0	● Support up to 4.3	●
iOS support for Mobile Access	●	● Support up to iOS 8 for 2016 Support up to iOS 9 for 2016 R2	● Support up to iOS 7	●
BlackBerry Z10 Support	●	●	●	●
All Access Licensing (Windows Access, Web Access and Mobile Access)	Workstation for Windows Access is no longer supported	●	●	●
Service Access Licensing	●	●		
Optimized ribbon style interface		●	●	●
Improvements to SQL express storage capacity	●	●	●	●
SQL Server 2014	●	●	●	
Windows ServeR 2012 R2	●	●	●	●
Microsoft Internet Information Server 8.5	●	●	●	

## 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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