MAXIMIZER

VERSION COMPARISON
User Guide

Updated for Maximizer CRM 2019 Release

Contents

Sales

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
Separated Leads module	●					
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	Strategy is read-only	Strategy is read-only	●	●	●
Opportunities following tab in Address Book and Hotlist modules	●	●	●	●	●	●
Better linkage between contacts and associated account manager	●	●	●	●	●	●
Web lead capture	Web form creates entries in AB	●	●	●	●	●
Capture campaign sources for leads and opportunities	●	●	●	●	●	●
Sales quota management[1]	●	●	●	●	●	●
Sales opportunity monitoring	●	●	●	●	●	●

1 - Only available in Enterprise Edition and Maximizer CRM Live

Customer Service

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
Case notification email templates	●					
Case Details following tab	●	●	●	●		
Define mandatory fields in cases using logic and rules	●	●	●	● Added in 2016 R2		
Pre-defined subjects included in search dialog	●	●	●	● Added in 2016 R2		
Customer Service following tab in Address Book and Hotlist modules	●	●	●	●	●	●
Web links to Knowledge Base articles	●	●	●	●	●	●
Notifications	●	●	●	●	●	●

Marketing

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
Campaign manager	●	●	●	● Improved in 2016 R2	●	●
Web lead capture	●	●	●	●	●	●
Campaign ROI management	●	●	●	●	●	●
Automated campaign templates	●	●	●	●	●	●
Campaign response metrics	●	●	●	●	●	●
Built-in marketing reports	●	●	●	●	●	●
Anti-spam functionality	●	●	●	●	●	
HTML text editor	●	●	●	●	●	●

Business Productivity

General

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
Custom tab with widgets	●					
File import tool supports leads	●					
File import tool (Excel, CSV, tab)	●	●				
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	●	●	●	●	●	●
Work with strategy	●	●	●			
Templates for Word (including templates for invoice, letter, purchase order, quote etc.)	●	●	●			
Templates for import (including templates for CSV, tab-delimited and MXI import)	●	●	●			
Quick search enhancement. Use search parameters to narrow down the search; combine multiple parameters; search opportunities and cases by Address Book entry.	●					
Quick search enhancement. Support searching opportunities or cases (2017); provide suggestions (2017 R2) .	●	●	● Added in 2017 + 2017 R2	●	●	●

Email

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
Bcc all outgoing emails	●	● Added in 2018 R2				
Anti-spam functionality	●	●	●	●	●	
Enhanced email unsubscribe functionality	●	●	●	●	●	
Web form for email preference management	●	●	●	●	●	
Email merge fields	●	●	●	● Enhanced in 2016 (Allow user fields)	●	●
Email handling	●	●	●	●	●	●
Automated sending of outgoing emails to different email inboxes	●	●	●	●	●	●

Notes & Documents

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
Search notes in Notes following tab	●					
Add documents into Documents tab directly by drag and drop	●	●				
Allow printing multiple notes at the same time in Notes following tab	●	●	●	● Added in 2016		
Notes filter that allows selecting multiple note types	●	●	●	●		
Documents filter that allows selecting multiple document types and categories	●	●	●	●		
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	●	●	●	●		

Search

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
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	●	●	●	●	●	
Saved searches can be configured with variables for greater flexibility	●	●	●	●	●	●
Centralized template library for documents and Excel reports	●	●	●	●	●	●
Email documents from within the documents tab	●	●	●	●	●	●

Address Book Entries

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
Automatically format phone number based on locale setting	●	●				
New global edit tool using backend service	●	●	●	●	●	
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	●	●	●	●	●	●
Saved searches can be configured with variables for greater flexibility	●	●	●	●	●	●
Contacts following window	●	●	●	●	●	●
Email documents from within the documents tab	●	●	●	●	●	●

Appointments & Tasks

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
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	●	●	●	●	●	
Saved searches can be configured with variables for greater flexibility	●	●	●	●	●	
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 other modules
Task dependencies and sequencing in action plan	●	●	●	●	●	●
Appointment management with accounts (Non-Maximizer users)	●	●	●	●	●	●

Other Improvements

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
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 n 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 n 2016 R2		
Ability to search for a field in Global Edit dialog	●	●	● Added in 2017 R2			
Perform other actions while editing a note	●	●	●	●		
Pre-built email and campaign templates	●	●	●	●	●	
VOIP integration	●	●	●	●	●	
User-defined fields with clickable hyperlinks	●	●	●	●	●	●
Quick access for frequently used saved searches and Favorite Lists	●	●	● Enhanced in 2017 R2			
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 n 2016 R2	●	

Customizations

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
Data access web service API	●	●	● Enhanced	●	●	●
Web following grid integration framework	●	●	●	●	●	●
Search Address Book entries by the fields in custom following tabs	●	●	●	●	●	●
Label customization per user	●	●	●	●	●	●
Customizable user profile such as email, address and photo	●	●	●	●	●	●
Customize which following windows to display	●	●	●	●	●	●
Startup preferences	●	●	●	●	●	●
Key Fields customization within Web Access	●	●	●	●	●	●
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	●	●	● Enhanced	●	●	●
Expanded key fields customizations and display options	●	●	●	●	●	●
Following tab grid (Column width resizing, column sorting, tooltip display for drop-down lists)	●	●	●	●	●	
Key field list group titles	●	●	●	●	●	

Business Intelligence

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
Notifications sent by emails	●					
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	●	●
Single and multi-value grouping on dashboards	●	●	●	●	●	●
Share dashboards via email	●	●	●	●	●	●
SQL server reporting services (SSRS)	●	●	● Available in Web Access only	● Available in Web Access Only	●	●

Usability Enhancements

Notification Panel

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
Display notifications in toasters and desktop notification	● Enhanced	● Enhanced	● Added in 2017 R2			
Allow dismiss alarms in Notification panel	●	●	●			
Notification panel for alarms and meeting invitations	●	●	●	●	●	

Calendar

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
Refreshing new interface	●	●	●			
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

Appointments

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
Support organizer in appointment	●	●	●			
Support all day and multi-day appointments	●	●	●			
Conflict checking	●	●	● Optimized to avoid multiple prompts	●	●	
Suggest next available time slots in conflict checking	●	●	●			
Quick search field for inviting users and contacts	●	●	●			
Create appointment on behalf of others	●	●	● Improved			

List Management

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
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	●	●	●	●	●	●

Key Fields

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
Key Field list tooltip descriptions	●	●	●	●	●	
Hide blank fields in Key Fields list	●	●	●	●	●	
Shortcut for Key Fields setup	●	●	●	●	●	●

Other Enhancements

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
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	●	●	●			
Place commonly used Maximizer Outlook integration buttons into the Home tab of Outlook	●	●	●			
Hide completed activities in Hotlist	●	●	●	●	●	
Hidden "following" tab for users without viewing rights	●	●	●	●	●	
Support custom address format	●	●	●	●	●	
Easier retrieval of Mobile Access URL	●	●	●	●	●	●
Filters in activity tab stored between sessions	●	●	●	●	●	●
Associate column views to saved searches and Favorite Lists	●	●	●	●	●	●
Support for international time zones	●	●	●	●	●	●

Integrations

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
New apps: HubSpot, Marketo, MYOB and Twilio	●					
App Directory	●	●				
Integration with QuickBooks	●	●				
Map following tab	●	●				
Excel Quote Add-in (for CRM Live 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	
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	●	●	●	●	●	●
Maximizer Connect for use with Zapier (for CRM Live only)	●	●	●	●	●	
Auto-save emails by email address	●	●	●	●	●	

Integrations (continued)

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
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	●	●	●	●		
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	●	●	●	● Added in 2016 R2	●	●
Saving emails to Maximizer opportunities	●	●	●	●	●	●
Saving email to Maximizer CS cases	●	●	●	●	●	●
Maximizer and Outlook calendar synching	●	●	●	●	●	●
Mr./Ms. merge fields in Word add-in	●	●	●	●	●	
Envelope and label address formatting		●	●	●	●	

OS Support & Additional Features

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
Windows 10	●	●	●	●	●	●
Windows 8.1	●	●	●	●	●	●
Windows 8	●	●	●	● Added in 2016 R2	●	●
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	●	●
Internet Explorer 8						●
Google Chrome for Windows and Mac	●	●	●	●		
Mozilla FireFox for Windows and Mac	●	●	●	●	●	●
Android support for Mobile Access	●	●	●	● Supported up to 6.0	● Supported up to 4.3	●
iOS support for Mobile Access	●	●	●	● 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	●	●	●	●	●	

Mobile Access

	Version 2019*	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
Group fields in Key Fields, following the groups in Web 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	•	•	•			
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	•	•	•	•		
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)	•	•	•	•	•	•

Mobile Access (continued)

	Version 2019	Version 2018/R2	Version 2017/R2	Version 2016/R2	Version 2015/R2	Version 12
Customizable column views	●	●	●	●	●	●
Open and share documents	●	●	●	●	●	●
Mobile access for tablets (iPad, Android tablets)	●	●	●	●	●	●
Create shortcut on device home screen	●	●	●	●	●	●
Shortcut to email/ call in list view (For smartphones)	●	●	●	●	●	●
Multi-user appointments	●	●	●	● Enhanced in 216 R2	●	●
Manage Key Fields	●	●	●	●	●	●
Send emails	●	●	●	● Enhanced in 216 R2	●	●
Manage appointments	●	●	●	●	●	●
Mobile dashboards	●	●	●	●	●	●
Change the maximum number of entries that can be retrieved	●	●	●	● Enhanced in 216 R2	●	●

* Mobile Access functionality in Version 2019 is exactly the same as Version 2018. There are no new updates as we are now developing native mobile apps.

MAXIMIZER

"Since 1987, more than **1 million users** and over **120,000 companies** have trusted us to help boost their bottom line"

Vivek Thomas, President

Grow with Confidence. Grow with Maximizer.

We make enabling your success our top priority. That's why we're committed to helping each of our customers achieve outstanding results.

With top-rated tools for contact management, lead management and customer service, Maximizer CRM gives businesses everything they need to grow – all in one place.

Today, Maximizer is a global company with offices in five countries plus an international network of Certified Solution Providers. We constantly innovate to ensure our customers can become more successful.

Time and time again, they tell us that our exceptional service sets us apart as a market leader in CRM. And that feedback keeps us focused on making planning, selling and management ever easier – to help our customers get rapid results.

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#GrowWithConfidence

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