Maximizer CRM
VERSION COMPARISON FOR WEB ACCESS (EMEA)

Sales

	Maximizer CRM 2017	Maximizer CRM 2016/R2	Maximizer CRM 2015/R2	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[1]	●	●	●	●
Sales opportunity monitoring	●	●	●	●

1 - Only available in Enterprise Edition and Maximizer CRM Live

Customer Service

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

	Maximizer CRM 2017	Maximizer CRM 2016/R2	Maximizer CRM 2015/R2	Maximizer CRM 12
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

	Maximizer CRM 2017	Maximizer CRM 2016/R2	Maximizer CRM 2015/R2	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	●			
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	●	●	●
Email				
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 and Documents				
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	●	●		
Default document	●	●		
Centralized template library for documents and Excel reports	●	●	●	
Email documents from within the documents tab	●	●	●	
Search				
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	●	●	●	

Feature				
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	●	●	●	●
Address Book Entries				
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	●	●	●	●
Contacts following window	●	●	●	●
Appointments and Tasks				
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)	●	●	●	●
Other Improvements				
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		
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	●	●	●	●
Customer timeline	●	●	●	●
Web links to external documents and social media profiles	●	●	●	●
Notes and emails text editor	●	●	●	●
Context videohelp	●	● 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

	Maximizer CRM 2017	Maximizer CRM 2016/R2	Maximizer CRM 2015/R2	Maximizer CRM 12
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	●	●	●	●
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	●	●	●	●
Following tab grid (Column width resizing, column sorting, tooltip display for drop-down lists)	●	●	●	
Key field list group titles	●	●	●	

Business Intelligence

	Maximizer CRM 2017	Maximizer CRM 2016/R2	Maximizer CRM 2015/R2	Maximizer CRM 12
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	●	●

Mobile Access

	Maximizer CRM 2017	Maximizer CRM 2016/R2	Maximizer CRM 2015/R2	Maximizer CRM 12
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)	●	●	●	●
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)	●	●	●	●
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

	Maximizer CRM 2017	Maximizer CRM 2016/R2	Maximizer CRM 2015/R2	Maximizer CRM 12
Notification Panel				
Allow dismiss alarms in Notification panel	●			
Notification panel for alarms and meeting invitations	●	●	●	
Calendar				
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
Appointment				
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				
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				
Key Field list tooltip descriptions	●	●	●	
Hide blank fields in Key Fields list	●	●	●	
Shortcut for Key Fields setup	●	●	●	●
Other Enhancements				
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

	Maximizer CRM 2017	Maximizer CRM 2016/R2	Maximizer CRM 2015/R2	Maximizer CRM 12
Outlook 365 Add-in (for CRM Live only)	●			
Maximizer Connect for use with MailChimp (for on premise only)	●	●	● Work with 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	●	●	●	●
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	●	●		
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	●	●	●	●
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 and Additional Features

	Maximizer CRM 2017	Maximizer CRM 2016/R2	Maximizer CRM 2015/R2	Maximizer CRM 12
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	●	●
Internet Explorer 8				●
Google Chrome	●	●		
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	●	●	●	