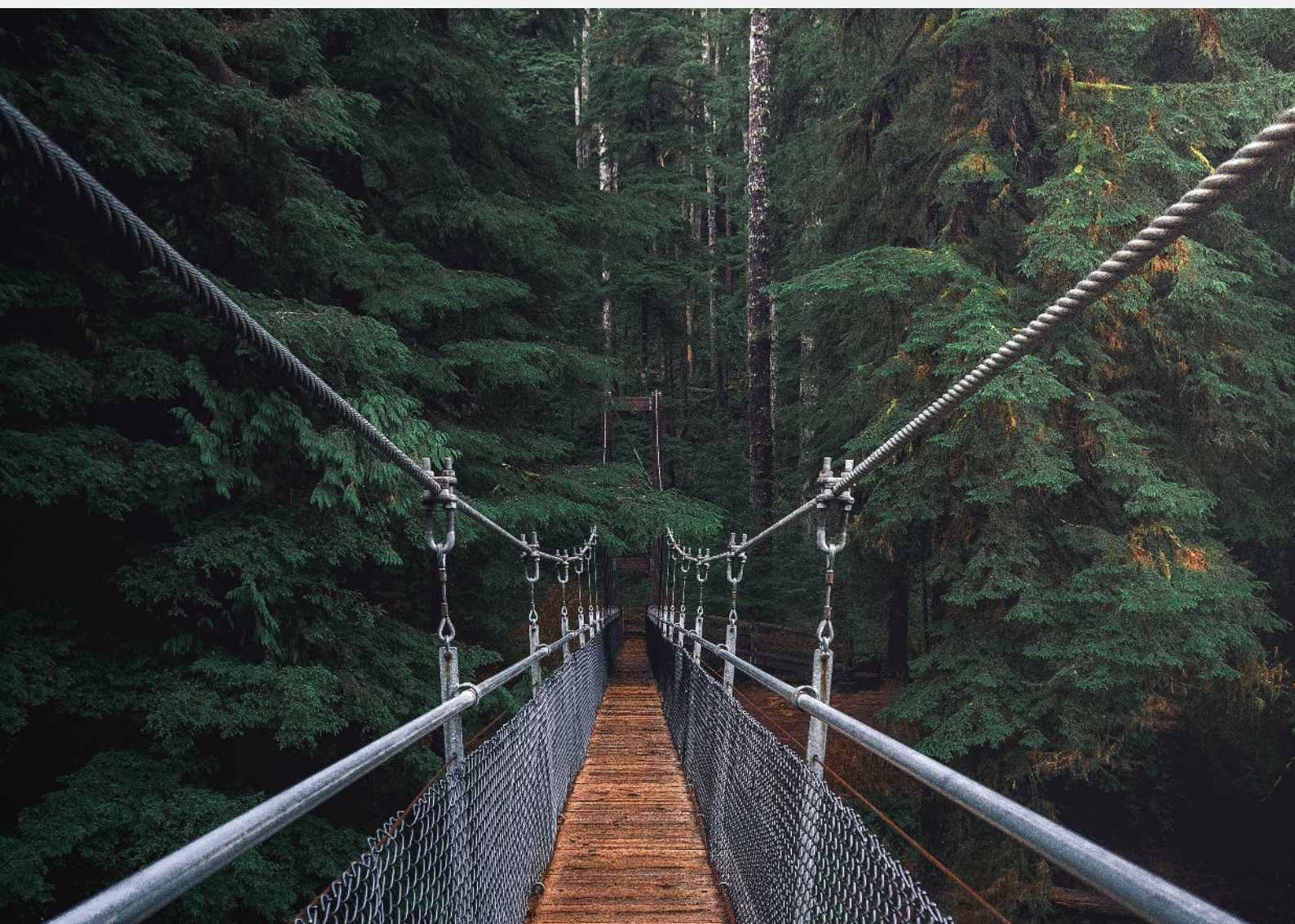




Version Comparison Guide.

Updated for Maximizer CRM 2020



CONTENTS

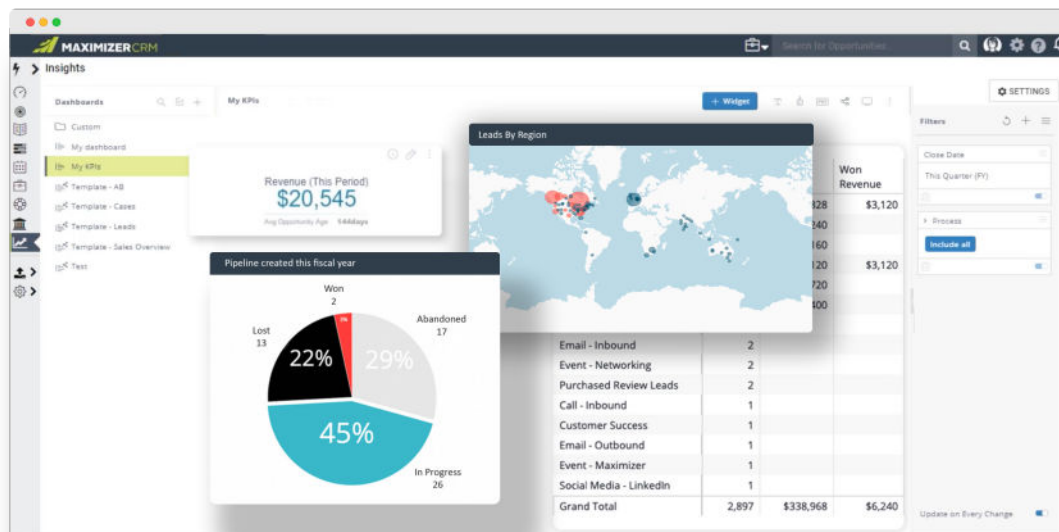
Insights - Business Intelligence	3
Reporting & Dashboards	4
Sales	6
Customer Service	7
Marketing	7
Business Productivity	8
Email	9
Notes & Documents	9
Search	10
Address Book Entries	10
Appointments & Tasks	11
Other Improvements	12
Customizations	13
Usability Enhancements	14
Notification Panel	14
Accessibility	14
Calendar	14
Appointments	15
List Management	15
Key Fields	15
Other Enhancements	16
Integrations	17
OS Support & Additional Features	19



Insights - Business Intelligence

	2020	2019	2018	2017	2016
Multiple data sets on the same chart (This year v.s. Last Year can be removed with one click)	●				
Data Exploration (dynamic dashboard filters, drill downs and click throughs)	●				
New chart types (Stacked bar chart, Scatter Map, Map, Calendar Heatmap, Treemap, Funnel, Polar Chart, Sunburst)	●				
Pivot Table Capabilities (Groups, Subtotals)	●				
Export widget as PDF, PNG CSV	●				
Scheduled emailed report subscription	●				
Easily customizable widgets (duplicate, rename, change color, add free text etc.)	●				
Single and multi-value grouping on dashboards	●				

*Business intelligence capabilities outline above are available with Maximizer CRM Insights.



Reporting & Dashboards

	2020	2019	2018	2017	2016
Notifications sent by emails	●	●			
Condition based Notifications	●	●	●	● Added in 2017 R2	
Pre-built Excel report templates for Dashboards (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 colum set- up associated with saved search)
Single and multi-value grouping on dashboards	●	●	●	●	●
Share dashboards via email	●	●	●	●	●
SQL server reporting services (SSRS)	Discontinued	●	●	● Available in Web Access only	● Available in Web Access Only



Sales

	2020	2019	2018	2017	2016
Separated Leads module	●	●			
Support user-defined fields for leads	●				
Customizable Industry and Source fields for leads	●				
Support multiple lead qualification processes	●				
Support column setup in 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	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	Web form creates entries in AB	●	●	●
Capture campaign sources for leads and opportunities	●	●	●	●	●
Sales opportunity monitoring & quota management	●	●	●	●	●



Customer Service

	2020	2019	2018	2017	2016
Case notification email templates	●	●			
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

	2020	2019	2018	2017	2016
Campaign manager	●	●	●	●	● Improved in 2016 (Performance for adding subscribers)
Web lead capture		●	●	●	●
Campaign ROI management, reponse metrics and built-in marketing reports	●	●	●	●	●
Automated campaign templates	●	●	●	●	●
Anti-spam functionality	●	●	●	●	●
HTML text editor	●	●	●	●	●



Business Productivity

General

	2020	2019	2018	2017	2016
Allow the Administrator to manage default entries for others	●				
Custom tab with widgets	●	●			
File import tool allows creating new items for table fields	●				
File import tool support cases	●				
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	●	●	●	●	●
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 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

	2020	2019	2018	2017	2016
Bcc all outgoing emails	●	●	● Added in 2018 R2		
Anti-spam functionality	●	●	●	●	●
Enhanced email unsubscribe functionality, and 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

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 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

	2020	2019	2018	2017	2016
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	●	●	●	●	●

Address Book Entries

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	●	●	●	●	●
Contacts following window	●	●	●	●	●



Appointments & Tasks

	2020	2019	2018	2017	2016
Work with leads in Hotlist	•				
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	•	•	•	•	•
Task dependencies and sequencing in action plan	•	•	•	•	•
Appointment management with accounts (Non-Maximizer users)	•	•	•	•	•



Other Improvements

	2020	2019	2018	2017	2016
Move multiple entries from the following tab to the main page at the same time	●	●	●	●	● Added in 2016 R2
Action Panel in following tabs (Available in more following tabs, accessing the command when the panel is collapsed.)	●	●	●	●	● Added in 2016 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 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 n 2016 R2



Customizations

	2020	2019	2018	2017	2016
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	●	●	●	● Improved (Added start-up option for Opportunities and Customer Service)	●
Key Fields customization	●	●	●	●	●
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	●
Following tab grid (Column width resizing, column sorting, tooltip display for drop-down lists)	●	●	●	●	●
Key field list group titles	●	●	●	●	●



Usability Enhancements

Accessibility

	2020	2019	2018	2017	2016
Use keyboard to access the items in header bar	●				
Use keyboard shortcuts for navigation and commonly used commands	●	●			

Notification Panel

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

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



Appointments

	2020	2019	2018	2017	2016
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

	2020	2019	2018	2017	2016
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

	2020	2019	2018	2017	2016
App Directory	●	●	●		
Integration with Hubspot	●	●			
Integration with Twilio	●	●			
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	● Enhanced (Create new or update existing entries and schedule activities)	●	●	●	●
Maximizer Connect for use with MailChimp (for CRM Live and on premise)	●	●	●	●	●
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	●	●	●	●	●



Integrations (continued)

	2020	2019	2018	2017	2016
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

	2020	2019	2018	2017	2016
64-bit installation	•				
Support TLS 1.2	•				
Password hash and salt and single sign-on	•				
Support password complexity rule	•				
Windows 10	•	•	•	•	•
Windows 8.1	•	•	•	•	•
Windows 8	•	•	•	•	•
Windows 8 RT	•	•	•	•	•
Windows Server 2019	•	•		•	
Windows Server 2016	•	•	•	•	
Windows Server 2012/R2	•	•	•	•	•
Windows Server 2008/R2	Discontinued	•	•	•	•
SQL Server 2019	•				
SQL Server 2017	•	•	•		
SQL Server 2016	•	•	•	•	
SQL Server 2012/R2, 2014	•	•	•	•	•
SQL Server 2008/R2	Discontinued	•	•	•	•
Microsoft Internet Information Server 8.0, 8.5, 10	•	•	•	•	
Microsoft Internet Information Server 7.0, 7.5	Discontinued	•	•	•	•
Microsoft Office 365 (Desktop version)	•	•	•	•	•
Outlook 365 web version	•	•	•	•	
Microsoft Edge browser	•	•	•	•	•
Internet Explorer 11	•	•	•	•	•



OS Support and Additional Features (continued)

	2020	2019	2018	2017	2016
Google Chrome for Windows and Mac	●	●	●	●	●
Modzilla Firefox for Windows or Mac	●	●	●	●	●
Android support for Mobile Access	●	●	●	●	● Supported up to 6.0
iOS support for Mobile Access	●	●	●	●	● Support up to iOS 8 for 2016 and iOS 9 for 2016 R2
All Access Licensing (Windows Access, Web Access and Mobile Access)	●	●	●	Workstation for Windows Access is no longer supported	●
Service Access Licensing	●	●	●	●	●



Avrion delivers CRM solutions fully connected
with your business technologies, creating a
streamlined and automated way to work.

<http://www.avrion.co.uk/>

01992 661 244

1st Floor, 44a Fore Street, Hertford,
Hertfordshire, SG14 1AW, United Kingdom





www.maximizer.com

Copyright © 2020 Maximizer Services Inc., Maximizer Software Ltd., Maximizer Software Solutions Pty. Ltd. All rights reserved. Maximizer® CRM is a registered trademark of Maximizer Software Inc. Maximizer CRM, Maximizer CRM Live, Maximizer Contact Management, and other product names may be trademarks of their respective holders. This is for information purposes only. MAXIMIZER SOFTWARE INC. MAKES NO WARRANTIES, EXPRESSED OR IMPLIED, IN THIS SUMMARY.
DSVC-001-20181016