

# Version Comparison Guide.

Updated for Maximizer CRM 2021



# CONTENTS

- SALES..... 3
- CUSTOMER SERVICE ..... 4
- MARKETING ..... 4
- BUSINESS PRODUCTIVITY..... 5
- CONFIGURATION ..... 7
- BUSINESS INTELLIGENCE ..... 8
- USABILITY ENHANCEMENTS..... 8
- INTEGRATIONS ..... 11
- TECHNICAL FEATURES AND SUPPORTED PRODUCTS..... 12
- MOBILE ACCESS ..... 13



## SALES

	2021	2020	2019	2018	2017
Full and Read Access for leads	●				
Support user-defined fields for leads	●	●			
Customizable Industry and Source fields for leads	●	●			
Support multiple lead qualification processes	●	●			
Support column setup in Leads module	●	●			
Convert leads to opportunities	●	●	●		
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	●	●	●	●	●
Forecast report	●	●	●	●	●
Opportunity Details following tab	●	●	●	●	●
Define mandatory fields in opportunities using logic and rules	●	●	●	●	●
Opportunities following tab in Address Book and Hotlist modules	●	●	●	●	●
	●	●			
Web lead capture	Use Zapier integration	Use Zapier integration		●	●
Sales quota management	●	●	●	●	●
Sales opportunity monitoring	●	●	●	●	●

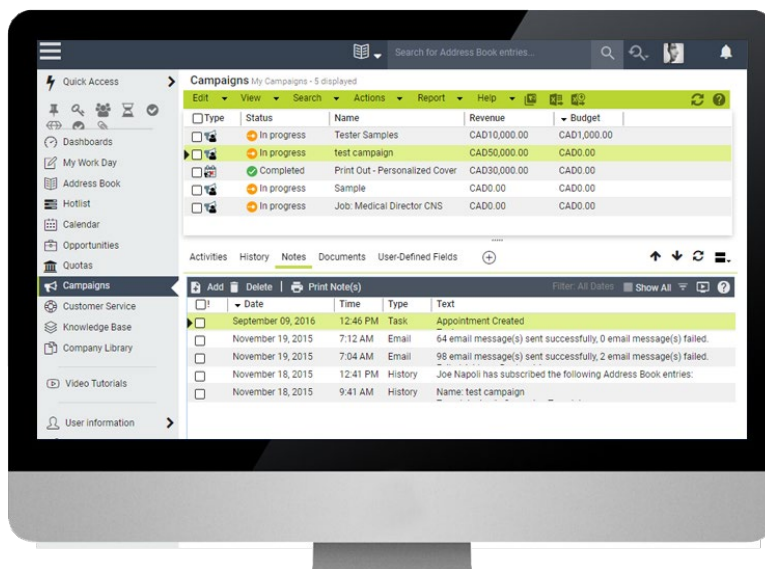


## CUSTOMER SERVICE

	2021	2020	2019	2018	2017
Case notification email templates	●	●	●		
Case Details following tab	●	●	●	●	●
Customer Service case auditing	●	●	●	●	●
Define mandatory fields in cases using logic and rules	●	●	●	●	●
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

	2021	2020	2019	2018	2017
Campaign manager	●	●	●	●	●
Web lead capture	●	●	●	●	●
Campaign ROI management	●	●	●	●	●
Automated campaign templates	●	●	●	●	●
Campaign response metrics	●	●	●	●	●
Built-in marketing reports	●	●	●	●	●
Anti-spam functionality	●	●	●	●	●
HTML text editor	●	●	●	●	●





## BUSINESS PRODUCTIVITY

	2021	2020	2019	2018	2017
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 supports 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	●	●	●	●	●
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)					
Email					
Bcc all outgoing emails	●	●	●	●	
Anti-spam functionality	●	●	●	●	●
Enhanced email unsubscribe functionality	●	●	●	●	●
Web form for email preference management	●	●	●	●	●
Email merge fields	●	●	●	●	●
Email handling	●	●	●	●	●
Automated sending of outgoing emails to different emailinboxes	●	●	●	●	●
Notes and Documents					
View Address Book entry notes in opportunities and cases	●				
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	●	●	●	●	●
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	●	●	●	●	●
<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>					
Auto complete address based on suggestions from Google	●				
Automatically format phone number-based locale setting	●	●	●	●	
New global edit tool using backend service (Address Book only)	●	●	●	●	
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	●	●	●	●	●
<b>Appointments and Tasks</b>					
View in Opportunities and Customer Service in Hotlist	●				
Work with leads in Hotlist (Displaying lead information in following tabs)	●	●			
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)	●	●	●	●	●
<b>Other Improvements</b>					
Move multiple entries from the following tab to the main page at the same time	●	●	●	●	●
Action Panel in following tabs (Available in more following tabs, accessing the command when the panel is collapsed.)	●	●	●	●	●
Ability to search for a field in User-defined Field following tab	●	●	●	●	●
Ability to search for a field in various dialog, including advanced search, column setup, merge field, Key Fields and formula user-defined field.	●	●	●	●	●
Ability to search for a field in Global Edit dialog	●	●	●	●	●
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	●	●	●	●	●
In-product “help” videos (Hotlists, email, notes and documents, global editing, user management, etc.)	●	●	●	●	●

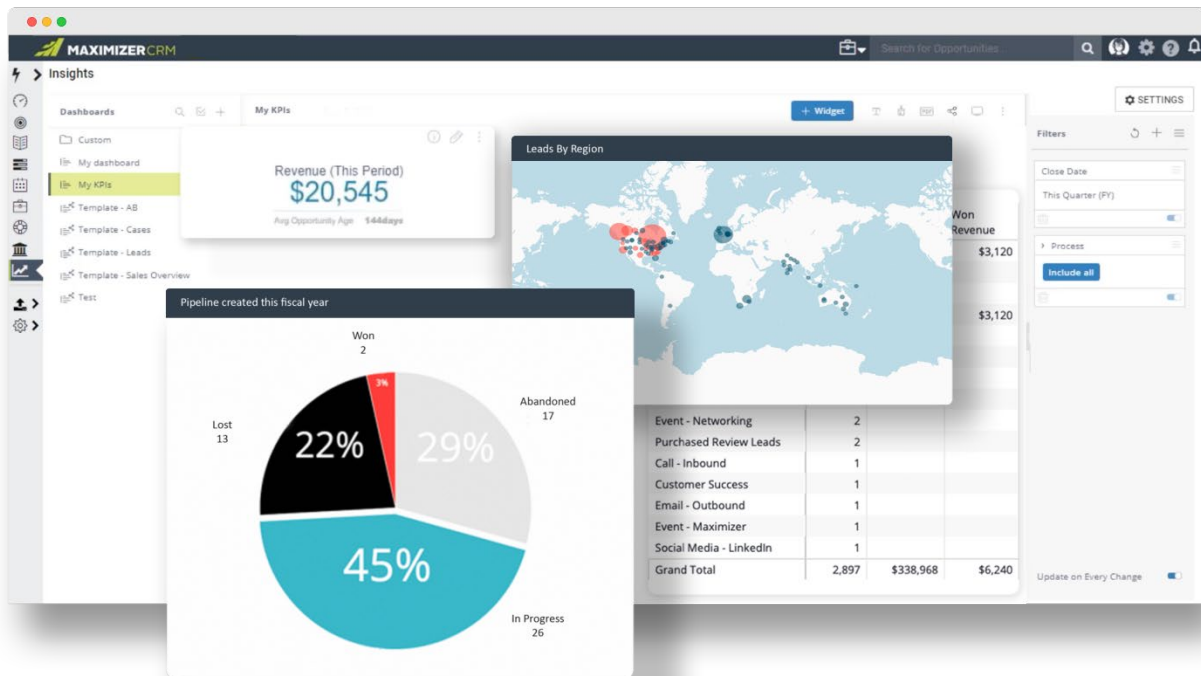
## CONFIGURATION

	2021	2020	2019	2018	2017
Support long and short date formats	●				
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	●	●	●	●	●
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

	2021	2020	2019	2018	2017
Insights	●	●			
Notifications sent by emails	●	●	●		
Condition based Notifications	●	●	●	●	●
Pre-built Excel report templates (Address Book, Customer Service, Opportunity, Campaigns and Hotlist)	●	●	●	●	●
Auditing functionality	●	●	●	●	●
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	●	●	●	●	●
Single and multi-value grouping on dashboards	●	●	●	●	●
Share dashboards via email	●	●	●	●	●
Dashboards	●	●	●	●	●
SQL server reporting services (SSRS)	Discontinued	Discontinued	●	●	●





## USABILITY ENHANCEMENTS

	2021	2020	2019	2018	2017
<b>Accessibility</b>					
Use the Tab key to navigate the main areas in the interface	●				
Use the arrow key to navigate the items in each area	●				
Support screen reader (JAWS)	●				
Keyboard shortcuts for Quick Search, add note/document, schedule meeting/tod0	●				
Keyboard shortcuts for navigating to modules	●	●	●		
Keyboard shortcuts for add new, save and cancel	●	●	●		
<b>Notification Panel</b>					
Display notifications in toasters and desktop notification	●	●	●	●	●
Allow dismiss alarms in Notification panel	●	●	●	●	●
Notification panel for alarms and meeting invitations	●	●	●	●	●
<b>Calendar</b>					
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	●	●	●	●	●
<b>Appointment</b>					
Support organizer in appointment	●	●	●	●	●
Support all day and multi-day appointments	●	●	●	●	●
Conflict checking	●	●	●	●	●
Suggest next available time slots in conflict checking	●	●	●	●	●
Quick search field for inviting users and contacts	●	●	●	●	●
Create appointment on behalf of others	●	●	●	●	●
<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	●	●	●	●	●
Other Enhancements					
Upload multiple documents at the same time	●	●	●	●	●
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

	2021	2020	2019	2018	2017
Gmail	●				
Twilio	●	●	●		
HubSpot, Marketo, MYOB	Discontinued	●	●		
App Directory	●	●	●	●	
Integration with QuickBooks	●	●	●	●	
Map following tab	●	●	●	●	
Excel Quote Add-in (for CRM Live and on premise)	●	●	●	●	●
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)	●	●	●	●	●
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	●	●	●	●	●
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	●	●	●	●	●



## TECHNICAL FEATURES AND SUPPORTED PRODUCTS

	2021	2020	2019	2018	2017
SAML SSO	●				
64-bit installation	●	●			
Support TLS 1.2	●	●			
Password hash and salt and single sign-on	●	●			
Support password complexity rule	●	●	●		
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 2014	●	●	●	●	●
SQL Server 2012 / R2	●	●	●	●	●
SQL Server 2008 / R2		Discontinued	●	●	●
Microsoft Internet Information Server 10.0	●	●	●	●	●
Microsoft Internet Information Server 8.5	●	●	●	●	●
Microsoft Internet Information Server 8.0	●	●	●	●	●
Microsoft Internet Information Server 7.0, 7.5,		Discontinued	●	●	●
Google Chrome	●	●	●	●	●
Microsoft Edge browser	●	●	●	●	●
Internet Explorer 11	●	●	●	●	●
Mozilla Firefox for Windows and Mac	●	●	●	●	●



## MOBILE ACCESS

	2021	2020	2019	2018	2017
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.	●	●	●	●	●
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)	●	●	●	●	●
Manage Key Fields	●	●	●	●	●
Send emails	●	●	●	●	●



Manage appointments	●	●	●	●	●
Mobile dashboards	●	●	●	●	●
Change the maximum number of entries that can be retrieved	●	●	●	●	●





## Further information



For more information about **MAXIMIZER**CRM 2021, contact Avrion, Maximizer's long term solutions partner:

Tel: +44 (0)1992 661244

Email: [enquiries@avrion.co.uk](mailto:enquiries@avrion.co.uk)

Web: [www.avrion.co.uk](http://www.avrion.co.uk)



[www.maximizer.com](http://www.maximizer.com)

Copyright © 2021 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.