

Version Comparison Guide.

Updated for Maximizer CRM 2021



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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	●	●	●	●	●

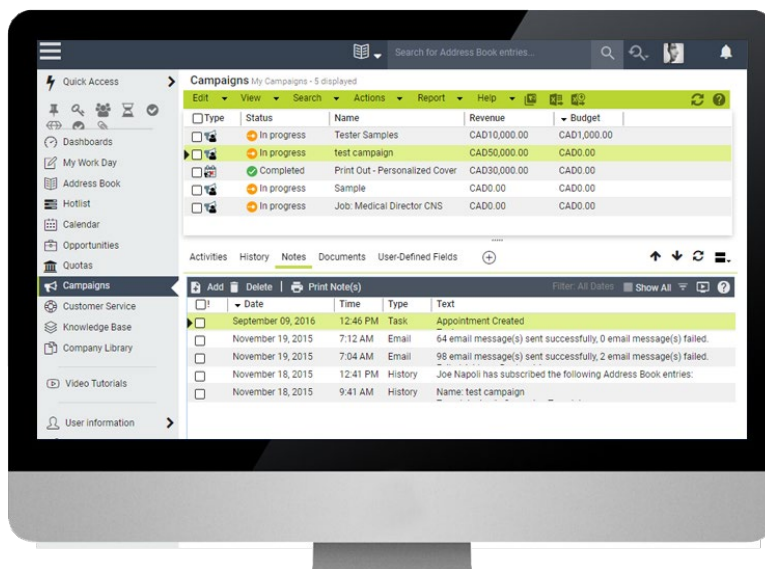


CUSTOMER SERVICE

	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	●	●	●	●	●
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	●	●	●	●	●
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					
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	●	●	●	●	●
Appointments and Tasks					
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)	●	●	●	●	●
Other Improvements					
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.)	●	●	●	●	●

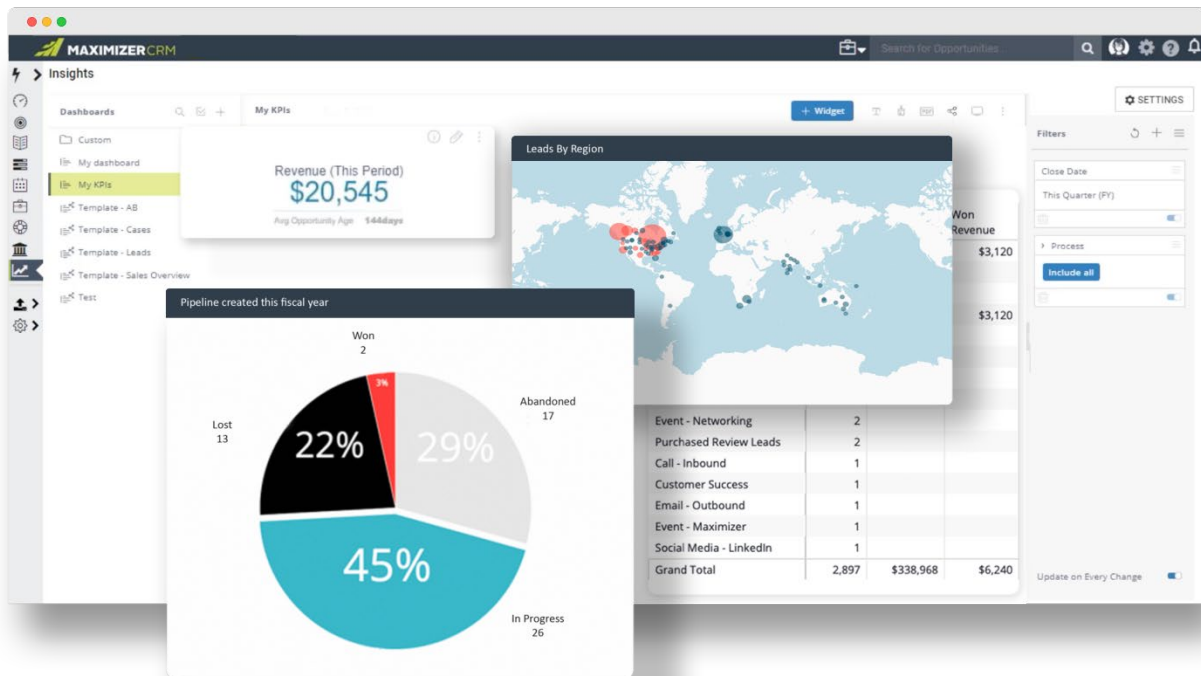
CONFIGURATION

	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
Accessibility					
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	●	●	●		
Notification Panel					
Display notifications in toasters and desktop notification	●	●	●	●	●
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	●	●	●	●	●
Appointment					
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	●	●	●	●	●
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	●	●	●	●	●
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	●	●	●	●	●





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FREE TRIAL

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