



Altimum IMS

Customer relationship management (CRM)
Business Intelligence



Altimum IMS - Documentation Center

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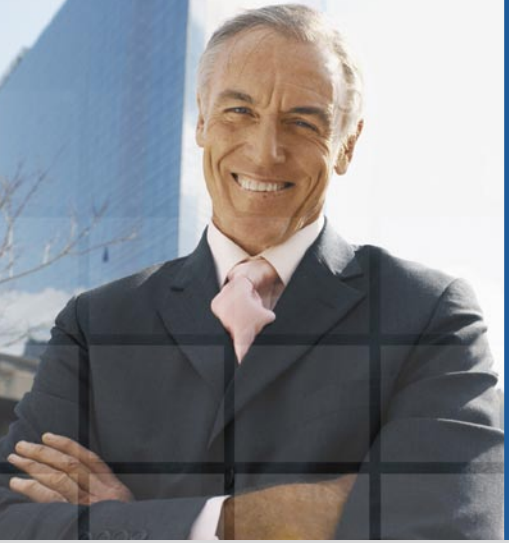
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Which is right for you?

Maximizer Enterprise CRM vs. Maximizer Contact Manager

“Financial services is an incredibly complex and competitive industry where expectations are high and customer loyalty can be hard to retain. Migrating from Maximizer to Maximizer Enterprise was easy. Using CRM technology helps us anticipate the needs of our customers and make informed suggestions to help them meet their financial goals – so not only are they more likely to stay with us, they are also likely to refer more business to us.”

*– Chris Carter,
Associate Director & Branch Manager,
ScotiaMcLeod*

Start with Maximizer for Contact Management

Small business owners have to perform many functions simultaneously—from tracking leads and closing sales to servicing customers. Maximize your time, improve customer satisfaction and increase sales with Maximizer – the award-winning contact manager ideal for home offices and individuals. It works right out of the box and is easy to configure, so you can get up and running quickly and focus on your business. With Maximizer, manage your contacts, schedule appointments & tasks, synchronize with Palm® devices, build an e-commerce website, generate website leads, and even link with QuickBooks®.

Move Up to Maximizer Enterprise™ for Customer Relationship Management

As your business grows, small and mid-sized businesses need to streamline processes and improve communications to attract more profitable prospects, increase sales and retain loyal customers. To grow your business and continue to service your existing customers effectively, you'll need a complete Customer Relationship Management (CRM) solution like Maximizer Enterprise.

In addition to the contact and schedule management capabilities of Maximizer, this flexible CRM solution integrates Marketing, Sales and Customer Service & Support in one powerful, integrated suite to support advanced sales collaboration & forecasting, automated marketing campaigns and customer service tracking. Maximizer Enterprise also enables remote, web and wireless web access, advanced business intelligence, process automation, and program customization.

Migrating from Maximizer or another contact manager to Maximizer Enterprise CRM is easy. Data transfers seamlessly without the need to re-enter information. And since the user-friendly interface is similar in both solutions, users won't have to learn a whole new system. No matter what size your business is, Maximizer Enterprise can help build profitable customer relationships that will drive your company's long-term success. In addition to managing contacts, Maximizer Enterprise enables companies to:

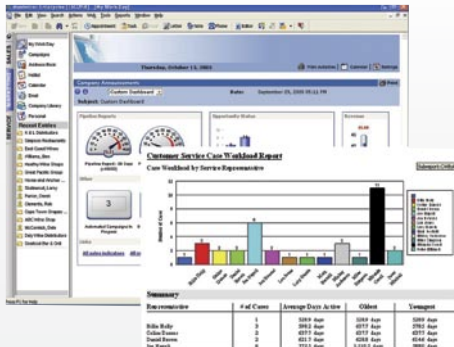
- Implement your own email marketing campaigns, monitor results, and integrate them with your website and customer records.
- Assign leads to your salespeople or distribution partners and collaborate as a team.
- Track customer service incidents and share the details with your team at any time.
- Provide users with remote synchronization, web access, or PDA access, including BlackBerry® and Pocket PC handheld devices.
- Visualize real-time metrics through Executive Dashboards and easily generate reports on your sales forecast & pipeline, marketing campaigns, lead status and customer service cases.
- Increase productivity by automating workflow, lead assignment, and other critical business processes.
- View complete customer information through one interface by customizing and integrating your solution with other critical business applications.

Which is right for you? Maximizer Enterprise CRM vs. Maximizer Contact Manager

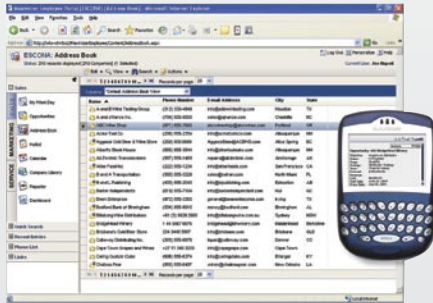


Compare Maximizer Enterprise CRM to Maximizer contact manager

USER FEATURES	Maximizer Enterprise 9 eCRM	Maximizer Enterprise 9 CRM	Maximizer 8
Sales			
Sales Executive Dashboard	✓		
Sales funnel reports	✓	✓	
Lead Summary reports	✓	✓	
Opportunity analysis & sales pipeline reports	✓	✓ (SQL only)	
Real-time alerts (out-of-the-box) include lead status, lead conversion, changed forecast, and won/lost deals**	✓	✓ (some in SQL only)	
Partner Relationship Management	✓		
Sales Action Plans	✓	✓	
Lead management and routing	✓	✓	
Sales process methodology	✓	✓	
Opportunity management & sales forecasting	Advanced	Advanced	Basic
Account management	✓	✓	✓
Marketing			
Campaign ROI calculator	✓	✓	
Lead Summary reports	✓	✓	
Real-time alerts (out-of-the-box) include lead status alerts, suspended & late campaigns	✓	✓ (some in SQL only)	
Marketing Action Plans (project management)	✓	✓	
Automated email campaigns	✓	✓	
Automated fax and print campaigns	✓	✓	
Campaign management	✓	✓	
Automatic campaign subscriber removal**	✓	✓	
Email monitoring and automatic replies**	✓	✓	
Campaign failure alerts	✓	✓	
Campaign tracking and metrics	✓	✓	
Do-not-solicit enforced by system	✓	✓	
Lead capture from website	✓	✓	✓
Customer segmenting with user fields	✓	✓	✓
List management	✓	✓	✓
Customer Service & Support			
Customer Service Executive Dashboard	✓		
Overdue case, case billing, other reports	✓	✓	
Real-time alerts (out-of-the-box) include case overload, overdue cases, and status changes**	✓	✓	
Case management (routing, queuing)	✓	✓	
Case resolution	✓	✓	
Case creation based on incoming email	✓	✓ (SQL only)	
Email monitoring and automatic replies**	✓	✓	
Knowledge Base	✓	✓	
Service billing	✓	✓	
Customer self-service	✓		
General			
Customer & Prospect Action Plans	✓	✓	
Key user-defined fields	✓	✓	
Categorized and multi-level user-defined fields	✓	✓	
Mandatory fields	✓	✓	✓
My Work Day (home page)	✓	✓	✓
My Work Day with company announcements	✓	✓	
Email & Calendar integration with Outlook	✓	✓	✓
Email & Calendar integration with Exchange Server	✓ (Add-on)	✓ (Add-on)	
Accounting Link for QuickBooks	✓ (Add-on)	✓ (Add-on)	✓ (Add-on)
Calendar	✓	✓	✓
Activity & task management	✓	✓	✓
Company Library	✓	✓	✓
Extensive customization of views	✓	✓	✓
Import/export in standard formats	✓	✓	✓
Letters, faxes with merge fields	✓	✓	✓



Customer Relationship Management: With Maximizer Enterprise, manage relationships with customers through marketing, sales and customer service, plus gain the insight you need to drive your business to success.



Customer Relationships On Demand: With Maximizer Enterprise, get on demand access to customer information – from your desk, through remote synchronization, through the web, or a PDA.



Standard modules included in Maximizer Enterprise eCRM & CRM Suite:

- Maximizer Enterprise Sales, Marketing, Customer Service & Support client software (one integrated application)
- Maximizer Enterprise server software
- Crystal Reports XI Professional (bundled with each client license)
- MaxExchange remote synchronization client software
- MaxExchange remote synchronization server software
- Maximizer Link licenses for Palm handheld device synchronization (same number as desktop client licenses included)
- ecBuilder Lite (Pervasive) or estore Manager (SQL suites)

Standard modules in Maximizer Enterprise eCRM suite (in addition to above)

- Employee Portal licenses (same number as desktop client licenses included; additional licenses available as an add-on)
- Wireless Employee Portal licenses (same number as desktop client licenses included; additional licenses available as an add-on with Employee Portal)
- Customer Portal (unlimited licenses)
- eStore Manager

Extras:

- Accounting Link for Use with QuickBooks
- Partner Portal (can only be applied to eCRM)
- Workflow Automation software (various configurations available: Corporate, Basic, Lite)
- MaxSync for Microsoft Exchange
- CRM Customization Suite
- eCRM Customization Suite
- Advanced Customization Suite
- Crystal Reports® Server (for other application data)
- Crystal Analysis®

Licenses for Pervasive or Microsoft SQL database licenses may be required if you do not have site licenses for these.

Support for HTML email	✓	✓	✓
Industry Packs		✓ (Pervasive only)	✓
Business Intelligence			
Executive Dashboard with Crystal Reports drill-down	✓		
Advanced report customization with Crystal Reports®	✓ (Professional)	✓ (Professional)	✓ (Embedded)
Out-of the box, pre-formatted reports	✓	✓	✓
Support for Crystal Analysis®	✓	✓	
Workflow Automation & Process Management (Add-on)			
Business process automation**	✓	✓	
Business activity monitoring **	✓	✓	
Automatic report distribution**	✓	✓	
Email monitoring and response**	✓	✓	
On Demand Access			
Employee Portal (Web Access)	✓		
Wireless Portal (Wireless Web Access)	✓		
Remote synchronization	✓	✓	
BlackBerry® access	synchronize through Outlook or access through wireless web	synchronize through Outlook	
Pocket PC access	synchronize through Outlook or access through wireless web	synchronize through Outlook	
Palm® synchronization	✓	✓	✓
eCommerce, Order Management			
Order management	✓	✓	
Customer online order tracking	✓		
eCommerce site creation	✓	✓	✓
Credit card processing	✓	✓	✓
Product catalog	✓	✓	✓
Administration & Security			
Support for Microsoft SMS	✓	✓	
Administrator-controlled Live Update	✓	✓	
Database format	Microsoft SQL	Microsoft SQL, Pervasive CRM	Pervasive CRM
Network configuration	Client-Server	Client-Server or Peer-to-Peer Workgroup	Single user or Peer-to-Peer Workgroup
# Users	5+ users	Client-Server: 5+ users Workgroup: 1-15	1 – 10 users
128-bit cipher public key encryption	✓	✓	
Full & Read-Only access settings	✓	✓	
Role-based security groups	✓	✓	
Customization			
Customization Suite with ODBC tools, hooks & triggers, sample code	✓	✓	
Desktop program customization	✓	✓	
Web interface customization	✓		
Direct SQL updates	✓	For SQL version	
Integration with other applications	✓	✓	
Integration with Internet & Intranet	✓	✓	
Advanced Customization Suite with Accounting API	✓	✓	
Microsoft® Technology Support & Integration			
Works with Excel®	✓	✓	
Works with Word	✓	✓	✓
Works with Outlook®	✓	✓	✓
Works with Exchange	✓ (Add-on)	✓ (Add-on)	
Support for SMS for installation	✓	✓	
Built for .NET framework	✓	✓	
Support for SQL Database	✓	✓ (SQL version)	
Uses MapPoint Technology	✓	✓	

** Requires Workflow Automation, powered by KnowledgeSync.



For More Information

Contact Maximizer Software
1-800-804-6299
sales@maximizer.com

Locate a Certified Solution Provider
1-800-624-4153

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www.maximizer.com

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Europe, Middle East & Africa

+44 (0) 1628 587777 phone
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info@max.co.uk
www.max.co.uk

What Makes Maximizer Enterprise Better?

- One fully integrated product that's easy to use
- Superior flexibility, easy to configure & customize
- Rapid implementation, simple to administer
- On demand access: Desktop, PDA & Web-Ready
- Integrates with Microsoft® Office and Outlook®, plus leading accounting programs
- Bullet-proof security
- Architecture built on industry standards
- Low total cost of ownership

Maximizer Enterprise 9

Designed for small and medium-sized businesses, Maximizer Enterprise 9 rapidly helps companies gain strategic insights and implement winning strategies that will outperform competitors. This proven, affordable CRM solution gives sales, marketing and service professionals the tools they need to attract prospects, win new customers and increase repeat business.

About Maximizer Software

Maximizer Software has helped over 7,000 Maximizer Enterprise customers and more than one million Maximizer users grow their businesses by building profitable customer relationships with award-winning solutions.

For more on Maximizer Enterprise 9, go to www.maximizer.com for access to:

- More product details
- Online demonstrations
- Live webinars
- CRM best practices white papers
- 30-day trial software
- Pre-recorded webcasts
- System requirements

Maximizer Enterprise works with technology from the following partners



Awards



Certified Solution Provider



Maximizer™
The CRM Company www.maximizer.com

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Altimum IMS

Customer relationship management (CRM)
Business Intelligence



Specialists at Altimum IMS work closely with your key personnel to build customer loyalty and optimize your company's business processes and growth.

Consultation

Evaluation of your needs and identification of your goals. Analysis of your unique service offer and business processes.

- Sales
- Marketing
- Customer Service
- Business Intelligence

Integration

Selection and customization of a CRM solution to meet your corporate goals.

Training/Coaching

Customized training of your personnel to link technology and processes.

- CRM application functions
- Business processes
- Corporate culture

Altimum IMS provides solutions which strengthen the relationship between your company and your customers.

For further information about Altimum IMS services,
Please call (514) 593-0085 or visit our Website:

www.altimumims.com