

Maximizer CRM in Our Cloud



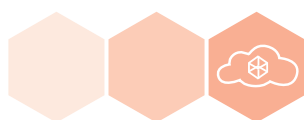
Compare all three editions of Maximizer CRMLive in detail below...

	Lite	Professional	Enterprise
	<i>Powerful CRM for managing customers & prospects</i>	<i>Full feature CRM for small and medium sized companies</i>	<i>Full, flexible CRM for medium and large companies</i>
Basic Package Options			
Base cost	£25 /User/Month	£32.50 /User/Month	£45 /User/Month
Data storage	200Mb Included	500Mb Included	1Gb Included
Increase/decrease user access on-demand, on a pay-as-you-use & no tie-in basis	✓	✓	✓
Annual health check & best practice review	Optional	✓	✓
Contact Management			
Unlimited companies & contacts	✓	✓	✓
Add account notes, phone logs, task history	✓	✓	✓
Appointment management with external contacts & multi user appointments	✓	✓	✓

"It is difficult to imagine how we would function without this invaluable tool to our business."

Peter Hunt, Director, Multipix Imaging

	Lite	Professional	Enterprise
	<i>Powerful CRM for managing customers & prospects</i>	<i>Full feature CRM for small and medium sized companies</i>	<i>Full, flexible CRM for medium and large companies</i>
Task management & assignment	✓	✓	✓
Company-wide document management & sharing	✓	✓	✓
Set call plans & reminders	✓	✓	✓
Save and attach documents	✓	✓	✓
Send emails (html)	✓	✓	✓
Send quick personalised email campaigns	✓	✓	✓
Merge to Word® templates	✓	✓	✓
Manage tasks, appointments	✓	✓	✓
Route planning (draw a map / Google Maps®)	✓	✓	✓
Link to Wikipedia®	✓	✓	✓
Create favourite lists	✓	✓	
Manage company brochures and documents in a library	✓	✓	✓
Integration with Word®, Outlook® & Excel®			
Microsoft Word plugin for templates	✓	✓	✓



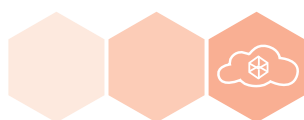


	Lite	Professional	Enterprise
	<i>Powerful CRM for managing customers & prospects</i>	<i>Full feature CRM for small and medium sized companies</i>	<i>Full, flexible CRM for medium and large companies</i>
Outlook email plugin for saving sent/inbound emails	✓	✓	✓
One-click export to Excel feature & advanced export to Excel	✓	✓	✓
Sales Management			
Capture campaign sources from leads and opportunities		✓	✓
Email merge fields		✓	✓
Sales Quota Management		✓	✓
Account management		✓	✓
Sales opportunity monitoring – real time alerts		✓	✓
Merge email templates		✓	✓
Direct access to LinkedIn®, Facebook® and other web properties search		✓	✓
Sales opportunity management		✓	✓
Territory management		✓	✓
Save documents to opportunity – quotes and orders		✓	✓

“The software just makes it easy in a fast moving environment for everyone in the organisation to know what is going on and who is doing it”

Graham Inskip, Managing Director, Graham Lloyd Ltd

	Lite	Professional	Enterprise
	<i>Powerful CRM for managing customers & prospects</i>	<i>Full feature CRM for small and medium sized companies</i>	<i>Full, flexible CRM for medium and large companies</i>
Partner relationship management		✓	✓
Competitor analysis		✓	✓
Sales process methodology – lead management & forecasting		✓	✓
Sales and performance forecasting		✓	✓
Sales executive dashboard		✓	✓
Sales strategies and action plans		✓	✓
Add account notes, phone logs, task history		✓	✓
Set call plans & reminders		✓	✓
Save and attach documents		✓	✓
Send emails (html)		✓	✓
One-click export to Excel feature & advanced export to Excel		✓	✓
Marketing Automation			
Advanced campaigns ROI management	✓	✓	✓
Automated campaign templates	✓	✓	✓



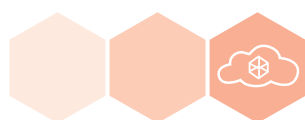


	Lite <i>Powerful CRM for managing customers & prospects</i>	Professional <i>Full feature CRM for small and medium sized companies</i>	Enterprise <i>Full, flexible CRM for medium and large companies</i>
Campaign management – response metrics	✓	✓	✓
Dashboard reports	✓	✓	✓
Multiple land-page tracking	✓	✓	✓
Email test feature	✓	✓	✓
Email campaign respondent lists	✓	✓	✓
Campaign ROI calculator	✓	✓	✓
Email & traditional style campaigns	✓	✓	✓
Marketing action plans	✓	✓	✓
Add account notes, phone logs, task history	✓	✓	✓
Set call plans & reminders	✓	✓	✓
Save and attach documents	✓	✓	✓
Automatic opt-out by subscriber	✓	✓	✓
Auto block-sending to 'do not solicit' marked contacts	✓	✓	✓
View linked leads/ opportunities per campaign	✓	✓	✓
Campaign failure alerts	✓	✓	✓

"Maximizer does not have the limitations I know other software packages have. The program is also very flexible because you can add and change parts... We cannot live without this anymore"

Gerwin Eersen, Managing Director, Gflex

	Lite	Professional	Enterprise
	<i>Powerful CRM for managing customers & prospects</i>	<i>Full feature CRM for small and medium sized companies</i>	<i>Full, flexible CRM for medium and large companies</i>
Customer segmentation & custom fields	✓	✓	✓
Customer email list management	✓	✓	✓
Customer Service & Support			
Case ticket management		✓	✓
Knowledgebase article management		✓	✓
Automatic notifications to customers		✓	✓
Case management (assigning, routing, queuing and escalation)		✓	✓
Case resolution management		✓	✓
Case monitoring and alerts		✓	✓
Customer service executive dashboards		✓	✓
Real time alerts for case overload, overdue, status changes etc.		✓	✓
Link cases to products/ services		✓	✓
Customise fields in cases		✓	✓
Customise layouts and views		✓	✓





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Add account notes, phone logs, task history		✓	✓
Set call plans & reminders		✓	✓
Save and attach documents		✓	✓
Send emails (html)		✓	✓
One-click export to Excel feature & advanced export to Excel		✓	✓

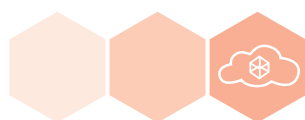
Mobile Access & Touchscreen Tablets

Support for iPhone®, iPad®, Android® Smartphones, & tablets, Blackberry®	✓	✓	✓
Access and manage all accounts and contacts (contact management)	✓	✓	✓
Compose email dialogue	✓	✓	✓
Mobile dashboards	✓	✓	✓
Manage sales opportunities		✓	✓
Manage customer service cases		✓	✓
View and share documents	✓	✓	✓
One-click access to online maps	✓	✓	✓

"We are pleased with Maximizer CRM, everything is easy to archive and easy to find. This system will save a lot of time... and we know that time is money!"

Chaymae Hamdouni, Marketing dept., Edam Soluzioni Ambientali Srl

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Email notifications for appointments	✓	✓	✓
Business Intelligence, Reporting & Dashboards			
Customisable dashboards centre, wizard driven for simple creation	✓	✓	✓
Dynamic drag and drop for dashboard layouts and graphs	✓	✓	✓
Dashboard sharing via email	✓	✓	✓
Support for Crystal Reports and SSRS (SQL Services Reporting)	✓	✓	✓
Search across all fields for data segmenting with one-click export to Excel, and advanced export to Excel	✓	✓	✓
Customisation & Administration			
Administration module access	✓	✓	✓
Manage full & read only settings	✓	✓	✓
Manage field level security	✓	✓	✓
Manage role based security groups	✓	✓	✓
Manage users and access rights	✓	✓	✓



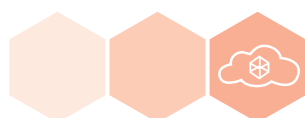


	Lite	Professional	Enterprise
	<i>Powerful CRM for managing customers & prospects</i>	<i>Full feature CRM for small and medium sized companies</i>	<i>Full, flexible CRM for medium and large companies</i>
Add users/delete users	✓	✓	✓
Manage preferences/rights	✓	✓	✓
Manage global database settings	✓	✓	✓
Manage time zones	✓	✓	✓
Manage system fields and settings	✓	✓	✓
Manage report and export rights	✓	✓	✓
Manage data groups	✓	✓	✓
Data Files & Document Storage			
Data storage per user	200Mb included	500Mb included	1Gb included
Double your files and document storage	Increase to 500Mb per user £2/user/month to a maximum 10Gb total per site.	Increase to 1Gb per user £2 /user/month.	Increase to 2Gb per user £2 /user/month.
Increase to unlimited files & document storage	Unlimited storage £4 /user/month to a maximum 10Gb total per site.	Unlimited storage £4 /user/month.	Unlimited storage £4 /user/month.
Mass Emailing Service / SMTP Server			
You can use your own SMTP mail server for sending emails and mass email campaigns from Maximizer. Alternatively buy a dedicated, safe and secure SMTP service from us	Per site price	Per site price	Per site price

“The roll out of Maximizer CRM to our Sales and Support teams has allowed everyone to understand what is happening with each of our customers”

Karl Miles, Technical Sales Manager, Peak Production Equipment Ltd

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MaxMail-10 send up to 10 emails per day		£1/Site/Month	
MaxMail-100 send up to 100 emails per day		£2/Site/Month	
MaxMail-200 send up to 100 emails per day		£5/Site/Month	
MaxMail-300 send up to 100 emails per day		£7/Site/Month	
MaxMail-500 send up to 100 emails per day		£10/Site/Month	
MaxMail-1000 send up to 100 emails per day		£15/Site/Month	
MaxMail-2000 send up to 100 emails per day		£22/Site/Month	
MaxMail-Unlimited send unlimited emails per day		£110/Site/Month	



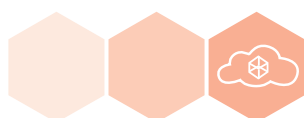


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Support Services			
Telephone Helpdesk Support For advice and assistance, 9am-5pm Mondays to Fridays excluding weekends & UK Public Holidays Remote Access Support For advice and assistance, 9am-5pm Mondays to Fridays excluding weekends & UK Public Holidays	+£5 per user/per month	+£6 per user/per month	✓
Maximize immediate ROI with fully-managed account services providing enrolment training for users, best-practice advisory & coaching, system set-up and configuration advice, and 10% discounted pricing on all online shop services	+£8 /user/month	+£8 /user/month	+£8 /user/month
Introduction getting started training	2.5 hours per group (4-user groups maximum)	2.5 hours per group (4-user groups maximum)	2.5 hours per group (4-user groups maximum)
One-to-one discussions with best-practice tips & recommendations given on how best to customise and setup the CRM system	Included (Maximum half day allowance)	Included (Maximum half day allowance)	Included (Maximum half day allowance)

"It gives me quick access to the information I need and helps me track where I am with customers and actions"

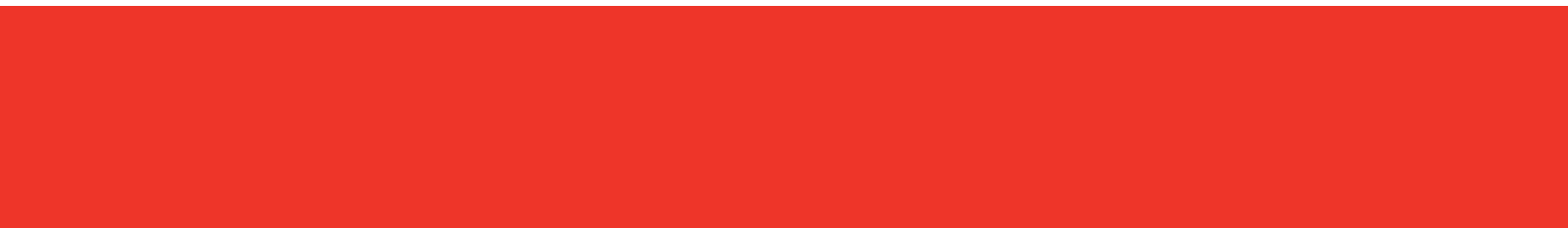
Clare Buchanan, account manager, eXception

	Lite	Professional	Enterprise
	<i>Powerful CRM for managing customers & prospects</i>	<i>Full feature CRM for small and medium sized companies</i>	<i>Full, flexible CRM for medium and large companies</i>
Access to dedicated account manager for on-going CRM advice, tips and system usage recommendations	✓	✓	✓
Data Backup Service			
Full backup of data files & documents	✓	✓	✓
Backup of data based on a 24 hour retention cycle	✓	✓	✓
Full backup of data files & documents based on a 7 day retention cycle (with optional wind-back retrieval service)	+£16 /Site/Month		
Full backup of data files & documents based on a 14 day retention cycle (with optional wind-back retrieval service)	+£24 /Site/Month		
OnLine Account Management			
Account upgrades, flexi-user-on-demand, data file & storage limits, mass email services, data backup services)	✓	✓	✓

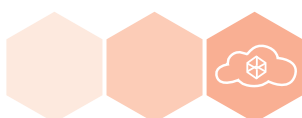




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Dedicated Server			
Upgrade your cloud-based CRM system to a dedicated Private Virtual Cloud Server (VPS), and do more in the cloud for your business		£120 per site / per month (+ initial £99 set up fee) (Includes an extra 50Gb storage in addition to your Maximizer CRMAnywhere storage allowance).	✓
Windows 2008 Licensed with single RDP access & administrator rights granted. Includes SSL certificate and Anti-Virus protection		✓	✓
Supports system integration & advanced CRM customisations		✓	✓
Automation & events using KnowledgeSync		Includes Knowledgesync Lite	Includes Knowledgesync Lite
VPS can be customised with specification upgrades		✓	✓
VPS can be added to own domain		✓	✓
Option to migrate from Cloud-CRM to VPS	Upgrade base package first	£99 Set-up fee	£99 Set-up fee
Payment Options			
Monthly Subscription by Credit Card, Direct Debit, & Credit Account (Subject to Acceptance)	✓	✓	✓



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Tailored & Bespoke Solutions			
Dedicated private cloud hosted CRM server(s) with full administration access private cloud hosted server(s) for your other business applications	✓	✓	✓
Training Services			
Full range of training services available (see shop for options and pricing)	✓	✓	✓





About Maximizer Software

Maximizer Software delivers Customer Relationship Management (CRM) software and professional services to meet the needs, budgets and access requirements of entrepreneurs, small and medium businesses and divisions of large enterprises.

Simple, easy to use and affordable, Maximizer CRM enables companies to mobilise their workforces through all-access web, smart phone, tablet and desktop delivery methods.

Easily configurable for organisations in any industry, Maximizer CRM optimises sales processes, enhances marketing initiatives and improves customer service to ultimately boost productivity and revenue.

With headquarters in Canada and offices and business partners worldwide, Maximizer Software has sold over one million licences to more than 120,000 customers since 1987.

Technology Partners



Maximizer CRM

Maximizer CRM helps small and medium-sized businesses maximize their marketing, sales, customer satisfaction capabilities and enhance their productivity and efficiency through the optimisation of what resources they have.

Why Maximizer CRM?

- Simple & quick to deploy, use and maintain
- Flexible access options through web, desktop and mobile devices
- Value for money with low total cost of ownership and monthly subscription models
- Expertise as a leader in pioneering CRM development, with more than 20 years experience.

Visit www.max.co.uk for:

- A trial of the latest release
- Information on how CRM can support your role
- Tools and eBooks
- Resources and information on Cloud based CRM
- An overview of technology and features
- Online demos and features
- White papers and webinars on CRM best practices.

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