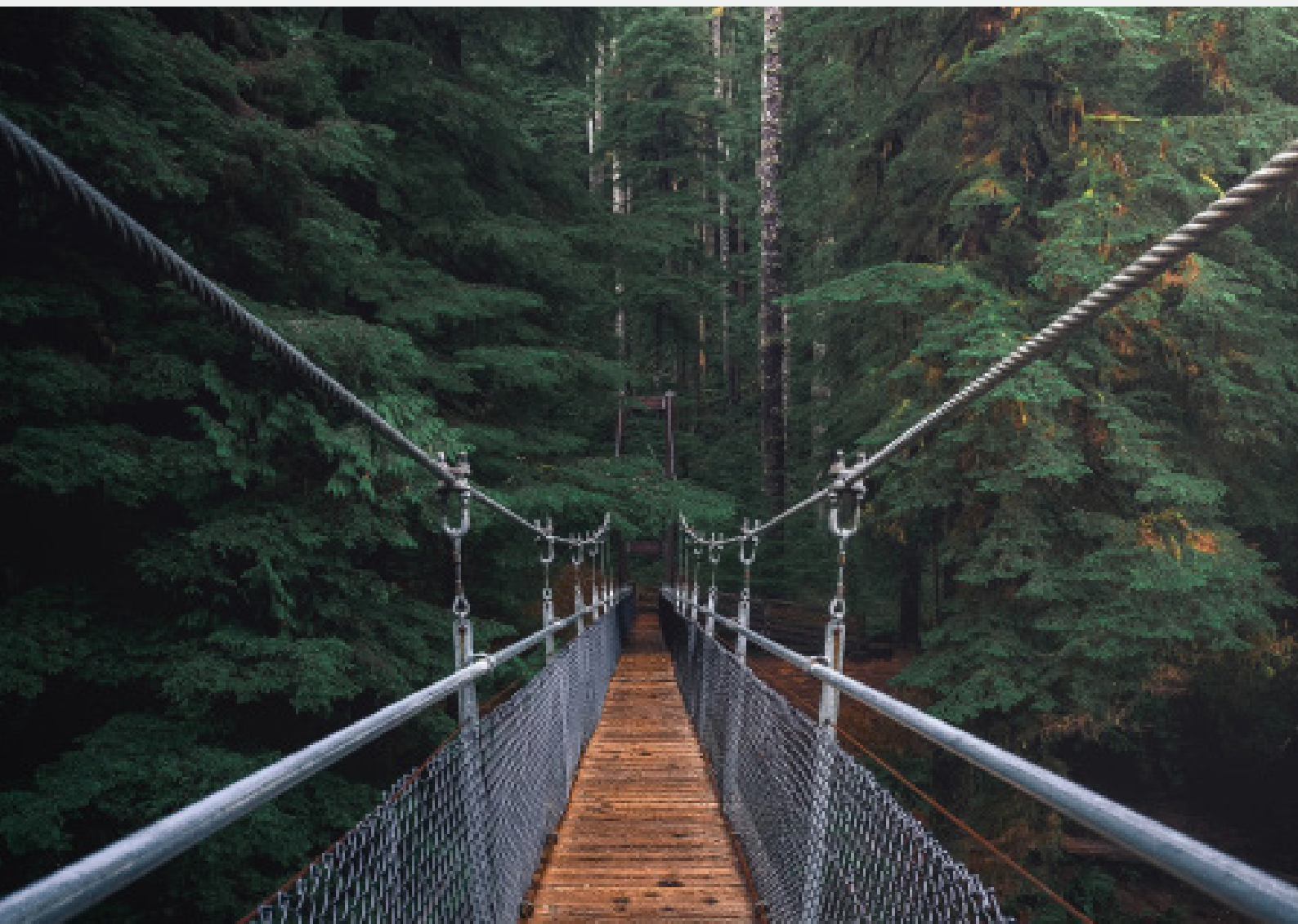




# Version Comparison Guide ●

Updated for Maximizer CRM 2020



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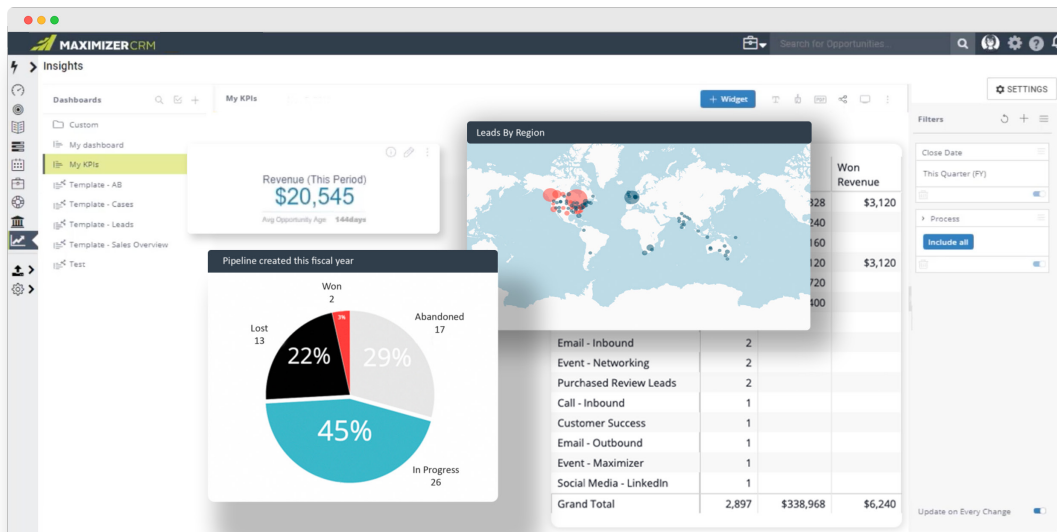
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# Insights - Business Intelligence

	2020 R1	2019	2018 R2	2017 R2	2016 R2
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 R1	2019	2018 R2	2017 R2	2016 R2
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 column setup 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 R1	2019	2018/R2	2017/R2	2016/R2
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 R1	2019	2018 R2	2017 R2	2016 R2
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 R1	2019	2018 R2	2017 R2	Version 2016/R2
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 R1	2019	2018 R2	2017 R2	2016 R2
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 R1	2019	2018 R2	2017 R2	2016 R2
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 R2	2017 R2	2016 R2
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 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 & Tasks

	2020 R1	2019	2018 R2	2017 R2	2016 R2
Work with leads in Hotlist	●				
View multiple users' activities 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 R1	2019	2018 R2	2017 R2	2016 R2
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 R1	2019	Version 2018/R2	Version 2017/R2	Version 2016/R2
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	●
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	●	●	●	●	●



# Usability Enhancements

## Accessibility

	2020 R1	2019	2018 R2	2017 R2	2016 R2
Use keyboard to access the items in header bar	●				
Use keyboard shortcuts for navigation and commonly used commands	●	●			

## Notification Panel

	2020 R1	2019	2018 R2	2017 R2	2016 R2
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 R1	2019	2018 R2	2017 R2	2016 R2
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 R1	2019	2018 R2	2017 R2	2016 R2
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 R1	2019	2018 R2	2017 R2	2016 R2
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 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	●	●	●	●	●





## Integrations (continued)

	2020 R1	2019	2018 R2	2017 R2	2016 R2
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 R1	2019	2018 R2	2017 R2	2016 R2
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 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 R1	2019	2018 R2	2017 R2	2016 R2
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	●	●	●	●	●





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