

Differences between Maximizer CRM Windows Access, Web Access and CRM Live

Updated for Maximizer CRM 2017 release. Windows Access has been discontinued in Maximizer CRM 2017 release.

	Windows Access	Web Access Your Cloud	CRM Live Our Cloud
Opportunities			
View and work with opportunities	√	√	√
Support multiple sales processes	×	√	√
Track stage age and overall opportunity age	×	√	√
Define mandatory fields in opportunities using rules	√	√	√
Opportunity monitoring	√	√	√
Capture campaign sources for opportunities	√	√	√
Sales quota management	√	√	√
Opportunity reports	√	√	√
Quick search for opportunities	×	√	√
Select a company or an individual during the creation of an opportunity	×	√	√
Work with strategies	√	×	×
Create and manage strategies (Strategy Library)	√	×	×
Dynamic teams in opportunities (add/remove team members)	√	×	×
Address Book			
View and work with Address Book entries	√	√	√
One-click to view an entry's address in map	×	√	√
VOIP integration	×	√	√
Display photo of an Address Book entry	×	√	√
Convert individual to a contact of a company	×	√	√
Move a contact to another company or individual	×	√	√
Email opt-in profile for each email address	×	√	√
Define mandatory fields using rules	√	√	√
Check for duplicates during manual creation of a new Address Book entry	√	√	√

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Quick Address Book entry search	√	√	√
Web to lead capture	√	√	√
Access recent entries	√	√	√
Record locking for Address Book entries	√	√	×
Customer Service			
View and work with Customer Service cases	√	√	√
Select a company or an individual during creation of a case	×	√	√
Define mandatory fields in cases using rules	×	√	√
Quick search for cases	×	√	√
Case monitoring	√	√	√
Assign/escalate/resolve cases	√	√	√
Notification about the changes of status	√	√	√
Customer Service cases reports	√	√	√
Marketing			
Ongoing campaigns	√	√	√
Fixed- date campaigns	√	×	×
Anti-spam functionality	×	√	√
Email type opt-in preference management	×	√	√
Campaign ROI management	√	√	√
Campaign template library	√	√	√
Campaign response metrics	√	√	√
Hotlist			
Rolling date range filter	×	√	√
Batch editing task date	×	√	√
Hide completed activities	×	√	√
View multiple users' activities at once	×	√	√
Filter for only showing the tasks created by the login user	×	√	√

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View and work with appointments and tasks	√	√	√
Set alarm for tasks	√	√	√
Assign tasks to other users	√	√	√
Find free time	√	×	×
Calendar			
View appointments and tasks in daily, weekly and monthly views	√	√	√
Availability view that displays free time with color codes	×	√	√
All day or multi-day appointments	×	√	√
Appointment organizer	×	√	√
Find free time in appointment dialog	√	√	√
Suggestion for next available time slots	×	√	√
View other user's calendar	√	√	√
Appointment invitation and reminder	√	√	√
Email templates for appointment invitation and reminder	×	√	√
Color codes for users, locations and resources	√	√	√
iCalendar (.ics) support through appointment email notification	√	√	√
Dashboard			
Dashboard click through to retrieve all data	√	√	√
Drill down to specific slice of pie or bar graph in dashboards	×	√	√
Email screenshot of the dashboard to other users	×	√	√
Support for SQL metrics	√	√	√
Business Productivity and User Experience			
Email			
Email templates support merging with Address Book entries, opportunities, cases and user information	√	√	√
Open saved email from entry's documents allow reply/forward message	√	√	√

Differences between Maximizer CRM Windows Access, Web Access and CRM Live

Email signature	√	√	√
Send emails based on the recipient's opt-in options	✘	√	√
Support email unsubscribe functionality	✘	√	√
Notes and documents			
Document filter that allows selecting multiple types and categories	✘	√	√
Note filter that allows selecting multiple types	√	√	√
Hyperlink documents	√	√	√
Key Fields			
Hide blank Key Fields	✘	√	√
Allow users to modify Key Fields	✘	√	√
Create groups for Key Fields	✘	√	√
Working with entries			
Perform other actions while editing a note	✘	√	√
Global edit	√	√	√
Right-click menu	√	√	√
Type ahead to locate entries	√	√	√
List management (Select all, Invert Selection, Make selected list current)	√	√	√
Following tabs			
Contacts, Opportunities, Notes, Documents, Related Entries, User-defined Fields	√	√	√
Activities following tab	✘	√	√
History tab	✘	√	√
Auditing tab	✘	√	√
Ability to show/hide following tabs and change the order of the tabs	✘	√	√
Automated Campaigns following tab	√	✘	✘
Action Plan			
Create, management and apply Action Plans	√	√	√
Task dependencies and sequencing in Action Plans	√	√	√
Others			
Automatically update the last contacted date	✘	√	√

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Duration user-defined field for age calculation	✘	✓	✓
Notification pane to show alarms and notifications for tasks and appointments	✘	✓	✓
Create default entry / default note	✓	✓	✓
Search functions, including saved search	✓	✓	✓
Favorite List	✓	✓	✓
Associate column views to saved searches and Favorite Lists	✓	✓	✓
Automatically adjust row height to fit all the stacked fields in a column setup view	✘	✓	✓
In-product "help" videos	✘	✓	✓
Order Desk and Quotes	✓	✘	✘
Label customization	✓	✓	✓
Coloring rule	✓	✓	✓
Security and Business Integrations			
Email notification about changing password	✘	✓	✓
Disallow login after several failed attempts	✘	✓	✓
Auditing the changes made in Address Book entries, opportunities and cases	✘	✓	✓
Excel report	✘	✓	✓
Column report and notes report	✓	✓	✓
Integration			
Outlook Add-in			
Track and save email to Maximizer entry	✘	✓	✓
Save email to Address Book entries	✓	✓	✓
Save emails to opportunities	✘	✓	✓
Save emails to cases	✘	✓	✓
Anti-spam functionality	✘	✓	✓
Option to include attachment or not when saving an email to a Maximizer entry	✘	✓	✓
Sync appointments, tasks and contacts	✓	✓	✓
Support 64-bit versions of Outlook	✘	✓	✓

Differences between Maximizer CRM Windows Access, Web Access and CRM Live

Word Add-in			
Access document templates stored in Maximizer	✘	✓	✓
Create or modify document templates stored in Maximizer	✘	✓	✓
Save document to Maximizer entries	✘	✓	✓
Print labels and envelopes	✓	✓	✓
Excel			
Export to Excel	✓	✓	✓
Excel reports	✘	✓	✓
Maximizer Connect for use with MailChimp			
Sync with MailChimp subscribers	✘	✓	✓
View MailChimp campaign information in Maximizer	✘	✓	✓
Maximizer Connect for use with Zapier			
Create Address Book entries, tasks and notes	✘	✘	✓
Maximizer Connect for Outlook 365 (Web version)			
Create Address Book entries, tasks and opportunities	✘	✘	✓