



MAXIMIZER CRM

EXTENDED PROFILE



OVERVIEW

We aren't just another CRM software provider. Maximizer provides companies with a proven competitive advantage!

Our CRM software comes loaded with all the features you need to succeed, all at one simple and all-inclusive price. You'll receive modules for Sales, Marketing, and Customer Service, as well as must-haves such as third-party integrations and mobile CRM access included in your monthly subscription.

Maximizer was a pioneer in the Customer Relationship Management Software industry, and since our beginnings in the 1980s, our leadership team continues to be dedicated to helping our customers grow and be successful in whatever vertical and industry they are in.

With a 30-day Free Trial, and a money-back guarantee you owe it to yourself and your customers to discover how easy Maximizer is to use, and how we can help your business succeed!

SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Maximizer CRM
SOFTWARE FEATURES	
API ACCESS	✓
CADENCE	✗
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✗
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✗
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✗
SALES GAMIFICATION	✓
QUOTATION HANDLING	✗
TASK ASSIGNMENT	✓

TERRITORY/QUOTA MANAGEMENT	✓
CUSTOMER SIZE	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✗
OTHER FEATURES	
MULTIPLE LOCATIONS	✗
MULTIPLE CURRENCY	✓
CUSTOMIZABLE	✗
MOBILE FEATURES	
IOS APP	✓
ANDROID APP	✓
NATIVE WEB APP	✗
HOSTING METHOD	
CLOUD	✓
ON-PREMISE	✓
FURTHER INFORMATION	
<p>CRM Live - Maximizer's Cloud - \$65 per user/per month. On-Premise CRM- Hosted on Your Server - \$40 per user/per month. CRM for Financial Advisors - Maximizer's Cloud - \$70 per user/per</p>	

PRICING

month.

IMPLEMENTATION TIMEFRAME

1 week

SOFTWARE SCREENSHOTS

MAXIMIZERCRM
Search for Customer Service Cases...

Quick Access

- Customer Service
- Administration

Customer Service All Cases - 43 displayed + new

Case Number	Company/Individual	Subject	Assigned To	Follow-up Deadline	Status	Priority	Elapsed Time
<input type="checkbox"/> HQ-00087	Bacchus Wine Market & Tasti	Spoilt product, resend	Joe Napoli	June 18, 2012 6:10 PM	Assigned	High	7.0 years
<input type="checkbox"/> HQ-00063	Beringer Vineyards	Ship error, refund request	Celine Dancer	May 9, 2012 6:15 PM	Wait for Cus	Medium	8.0 years
<input checked="" type="checkbox"/> HQ-00078	Bayville Package Store	Packaging defect	Joe Napoli	April 18, 2012 5:40 PM	Resolved	Medium	1.9 months
<input type="checkbox"/> HQ-00064	Bayville Package Store	Ship error, refund request	Celine Dancer	April 9, 2012 6:20 PM	Wait for Cus	Medium	8.0 years
<input type="checkbox"/> HQ-00065	Arrow Wine & Spirits	Ship error, refund request	Celine Dancer	April 9, 2012 6:17 PM	Wait for Cus	Medium	8.0 years
<input type="checkbox"/> HQ-00077	Arrow Wine & Spirits	Packaging defect	Joe Napoli	March 18, 2012 5:18 PM	Resolved	Medium	1.9 months
<input type="checkbox"/> HQ-00066	All The Best Spirits	Ship error, refund request	Celine Dancer	March 9, 2012 6:15 PM	Wait for Cus	Medium	8.0 years
<input type="checkbox"/> HQ-00079	All The Best Spirits	Packaging defect	Joe Napoli	February 18, 2012 5:16 PM	Assigned	Medium	7.2 years
<input type="checkbox"/> HQ-00080	Beacon Wine Spirits	Training Request	Joe Napoli	January 18, 2012 5:52 PM	Escalated	High	7.2 years
<input type="checkbox"/> HQ-00072	Aggassi Cold Beer & Wine St	icon bar to the right of tal	Joe Napoli	January 18, 2012 5:51 PM	Wait for Cus	High	8.0 years
<input type="checkbox"/> HQ-00074	Astor Wines & Spirits	Training Request	Joe Napoli	January 18, 2012 5:51 PM	Resolved	High	10.2 months
<input type="checkbox"/> HQ-00073	Amelia Liguors South	Training Request	Joe Napoli	January 18, 2012 5:51 PM	Resolved	High	10.2 months

Packaging defect
 Bayville Package Store
 HQ-00078

Resolved
 Anderson, Darin shane
 1.9 months

Description:
 Packaging for several object needs to read "non-alcoholized" instead of "de-alcoholized".

Products / Services:
 Sangiovese, Sangiovese Grosso

Categories:
 Italy

<Default Key Fields>

Case queue:	Standard	Status:	Resolved
Case type:	General Problem	Case owner:	Joe Napoli
Case reason:	Poor packaging	Assigned to:	Joe Napoli
Case origin:	Email	Priority:	Medium
Follow-up deadline:	April 18, 2012 5:40 PM	Severity:	Low

Actions

- Add a note
- Add a document
- Write an email
- Draw a map
- Make a call
- Receive a call
- Time a task
- Schedule a meeting
- Schedule a to-do
- Schedule an Action Plan
- Create an opportunity
- Create a case
- + Favorite List

MAXIMIZER CRM | Search for Customer Service Cases

Dashboards | 10 Current Cases - 0 displayed

Service Dashboard - for Managers

My Work Day | Dashboards

View | Print | Email | Refresh

Cases Created This Quarter - by Role

Role	Cases Created
Vendor Support	185
TS/Trainer	60
Sales Representative	165
Account Administrator	448
Lead Manager	32
Joe Thornaday	88
Account Administrator	98
Harriet Yee	223
General Manager	246
Feature Request	25
Executive / Regional Manager	14
Senior Support	22
Client Success	54
No report	1

Outstanding Cases - by Company

Company/Individual	Report Count
Company/Individual	47
PC - Even Investments	37
ForSite Health Inc.	36
PC - High Financial Planning Team	28
The Fraser Financial Group LP	28
PC - The Financial Team	28
The Financial Health Group	27
PC - The Mutual Team	22
PC - Midpoint Financial	19
Vancouver Financial Planning and Services	19
Spinnaker Wealth Inc.	19

Cases Resolved This Quarter - by Role

Role	Cases Resolved
Vendor Support	178
TS/Trainer	73
Sales Representative	162
Account Administrator	461
Lead Manager	31
Joe Thornaday	73
Account Administrator	112
Harriet Yee	227
General Manager	246
Feature Request	52
Executive / Regional Manager	1

Outstanding Cases - by Status

Status	Count
Resolved	933
Assigned	29
Escalated	6

Outstanding Cases - by Type

Type	Count
No value	541
Information Request	8
Technical Problem	475
FollowUp/Item 2	2

Cases Created This Quarter

1,751.00

Cases Resolved This Quarter

1,222.00

MAXIMIZER CRM | Search for Address Book entries

Hotlist | Share Contact - 44 displayed - new

Quick Access | Edit | View | Actions | Report | Help | Print | Refresh

Address Book Entry Details | Contacts | Customer Service | Opportunities | History | Notes | User-Defined Fields | Documents | Related Entries | All

Date	Time	Priority	Completed	Task	Creator	Assigned To	Name	Company	Phone
August 5, 2019	10:00 AM	Med	<input type="checkbox"/>	Spinn Review for All Teams	Jin				
August 5, 2019	10:15 AM	Med	<input type="checkbox"/>	Mobile Stand up	Shane				
August 6, 2019	10:15 AM	Med	<input type="checkbox"/>	Mobile Stand up	Shane				
August 7, 2019	10:15 AM	Med	<input type="checkbox"/>	Mobile Stand up	Shane				
August 8, 2019	10:15 AM	Med	<input type="checkbox"/>	Mobile Stand up	Shane				
August 8, 2019	3:00 PM	Med	<input type="checkbox"/>	Elena <- Shane Weekly	Shane				
August 9, 2019		Med	<input type="checkbox"/>	working from home	Shane				
August 9, 2019	10:15 AM	Med	<input type="checkbox"/>	Mobile Stand up	Shane				
August 12, 2019	10:15 AM	Med	<input type="checkbox"/>	Mobile Stand up	Shane				
August 12, 2019	1:00 PM		<input type="checkbox"/>	N/A	Shane				
August 13, 2019	10:15 AM	Med	<input type="checkbox"/>	Mobile Stand up	Shane				
August 14, 2019	10:15 AM	Med	<input type="checkbox"/>	Mobile Stand up	Shane				

Hotlist

10:15 AM 15m Med Mobile Stand up
@ Shane (maximizer.com.us)/9632018739

Tomorrow - Thursday August 8 2019

10:15 AM 15m Med Mobile Stand up
@ help@f

3:00 PM 30m Med Elena <- Shane Weekly
@ Shane (maximizer.com.us)/9632018739

Friday August 9 2019

All Day Med working from home

10:15 AM 15m Med Mobile Stand up
@ help@f

Actions

- Add a note
- Add a document
- Write an email
- Draw a map
- Make a call
- Receive a call
- Time a task
- Schedule a meeting
- Schedule a todo
- Schedule an Action Plan
- Create an opportunity
- Create a case
- Favorite List

Address Book Entry Details

Silvia Ristic

Test
Maximizer Software Inc Keep
2601 66 Smythe St
Vancouver British Columbia V6B0P5
Canada

Do not select by:
Category: Partner, Prospect
Date Last Contacted: June 17, 2019
Reports To:

Main: 604-601-8000 8050
Fax: (604) 306-2413
Mobile: 604-601-8000

Email: silviaristic@maximizer.com
Alternate: mristic@gmail.com
Website: www.maximizer.com

Screen Information