

Maximizer™ CRM 10 What's New Feature Guide

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Applicability

This document applies to Maximizer CRM 10 software and documentation and all other Maximizer CRM 10 add-on products:

- Accounting Link for Microsoft Dynamics GP
- Accounting Link Designed for Use with QuickBooks
- MaxMobile for BlackBerry
- MaxMobile for Windows Pocket PC
- MaxMobile for Windows Smartphone
- MaxMobile Wireless Synchronization Server
- MaxLink for Palm OS
- Maximizer Live Update Manager
- MaxExchange Synchronization Server
- Maximizer CRM Customization Suite
- MaxSync for Microsoft Exchange
- Workflow Automation Powered by KnowledgeSync

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Simply Successful CRM

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1.0 Introduction

Maximizer CRM is the Simply Successful CRM solution. CRM solutions include equal parts of advanced Sales, Marketing and Customer Service and Support functionality. Maximizer CRM 10 provides new and existing users with compelling new features and improvements in robustness, quality and usability. The theme of Maximizer CRM 10 is "work the way you want to". Primary areas of development include expanding Mobility, Microsoft Office integration, native Windows Mobile PDA application, and Web and Windows equality.

Maximizer Enterprise 9, v9.5, the previous version, already has:

- Extensive **Sales** functionality, with 21 years of development
- Excellent **Marketing** functionality with 8 years of development
- Comprehensive **Customer Service** functionality with more than 5 years of development

In addition to an updated interface and fresh logo, the product line is being re-positioned as Maximizer CRM. This will enable us to better position our offerings for small-to-medium-sized businesses (SMBs), and compete effectively in the changing CRM marketplace.

Maximizer CRM 10 will be divided into four editions that represent the target markets:

- Entrepreneur Edition
- Group Edition
- Professional Edition
- Enterprise Edition

This document lists the new features for the Group, Professional, and Enterprise Editions. The following matrix outlines the key differences between the Group, Professional, and Enterprise Editions.

	Group Edition	Professional Edition	Enterprise Edition
Upgrade From	Maximizer Enterprise W/G	Maximizer Enterprise C/S	Maximizer Enterprise eCRM
Database	MS SQL Express	MS SQL Server	MS SQL Server
User Limit	15	Unlimited	Unlimited
Web Access	Available	Available	Available
Module Functionality			
Sales	Standard	Standard	*Advanced with Territory Management
Marketing	Standard	Standard	*Advanced with Fax/Print Campaigns
Customer Service	Standard	Standard	*Advanced with KnowledgeBase
Business Intelligence	Standard	*Advanced with Web Reporting	*Advanced with Web Reporting
Security	Standard	*Advanced with Windows Authentication & Single Sign-on	*Advanced with Windows Authentication & Single Sign-on

* Modules listed above will also contain additional Workflow events as part of their advanced functionality in their respective editions

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Maximizer CRM Group Edition is the new equivalent of the former Maximizer Enterprise™ Pervasive Workgroup product. The primary difference between the former product and the new Maximizer CRM Group Edition is that the Group Edition now supports the Microsoft SQL Express database, and no longer supports the Pervasive Workgroup database.

Maximizer CRM Professional Edition is the new equivalent of the former Maximizer Enterprise Pervasive Client Server product, and the former Maximizer Enterprise MS SQL CRM product. The primary difference between the Pervasive Client Server product and the new Maximizer CRM Professional Edition is that the Professional Edition will now only support the Microsoft SQL Server database.

Maximizer CRM Enterprise Edition is the new equivalent of the former Maximizer Enterprise eCRM product.

All 3 editions of Maximizer CRM 10 are available in either or both Windows and Web Access, and additionally include the Partner, Customer, and Wireless Web Access. Also new to Maximizer CRM 10 are improvements in the MaxMobile products which will include support for BlackBerry devices, and wireless synchronization support for both Windows Mobile and BlackBerry devices. The other major new product we are introducing in Maximizer CRM 10 is the new Accounting Link for Microsoft Dynamics GP.

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38002 - Support Multi-Contact Appointment fields in Activities, Hotlist, Calendar (PPC)

Support multi-contact appointments in Activities, Hotlist, and Calendar screens. Retrieve multi-contact appointments in the Activities tab for Address Book, Opportunities and Cases. The Daily View is to display the Address Book entries comma separated up to 35 characters (with ellipses to indicate more). The current build shows all appointments as personal, this includes appointments with a single entry as well as appointments with multiple entries. When Schedule a Meeting is selected, retrieve all selected Address Book entries as attendees.

36592 - Multi-Contact Appointment - GUI for Smartphone

Support the display and synchronization of the new Multi-contact Appointment dialog fields in MaxMobile for Mobile Powered Smartphone devices. This feature is related to 38003 - Support Multi-Contact Appointment fields in Activities and Calendar (Smartphone).

34281 - Support Category in the Documents panel - GUI for Smartphones

Support category in the Documents panel, in Address Book, Opportunity and Customer Service windows. This feature is for implementing the GUI elements.

34280 - Support Category in the Documents tab - GUI for PPC

Support document category for MaxMobile for Mobile Powered Pocket PC devices. In Documents tab for Address Book Entry, Opportunity, and Customer Service add a new column named Category.

38272 - Create IIS Synchronization Server Installer for MaxMobile Wireless Synchronization

The IIS Synchronization Server component has been removed from the MaxMobile installation and a separate installation has been created. Maximizer CRM and Internet Information Services (IIS) Manager must be available in order for the install to proceed.

35095 - Products/Services and Categories - MaxMobile

The Appointment dialog has been updated to include the Products/Services and Categories fields. These fields are automatically populated in new appointments with the values for the related opportunity or case. These values can be modified if necessary.

36591 - Cradle Synchronization to Support New Appointment Dialog Fields

Cradle Synchronization supports the new Appointment dialog fields, Appointment Address Book entries, Products/Services and Categories, and Activities.

39264 - Change Product Name from MaxMobile CRM to MaxMobile

Change the product name on labels and graphics for MaxMobile for PPC and MaxMobile Smartphone. This feature is related to feature 39265 - Change Product Name from MaxMobile CRM to MaxMobile (BlackBerry).

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2.0 Mobility

2.1 MaxMobile for Windows Mobility

33883 - Wireless Synchronization for MaxMobile - Wireless Synchronization

Support for wireless synchronization of Address Book, Opportunity and Customer Service entries including their notes, documents and selected User-Defined Fields (UDF) has been added. First synchronization must be performed via cradle then wireless synchronization may be performed directly from the mobile device. Wireless synchronization is performed via Internet Information Services (IIS) hosting the Wireless Access and the MaxMobile device.

35007 - Wireless Synchronization for MaxMobile (GUI for PPC)

A new icon has been added to 'MaxMobile - Home', the icon 'Wireless Synchronization' opens the synchronization settings and allows the user to perform a wireless synchronization to the provided Synchronization URL. Two synchronization options are available: 'Synchronize MaxMobile' and 'Reset MaxMobile'.

34235 - Wireless Synchronization for MaxMobile - Synchronization Settings

Create an interface to support the specifying of the following Wireless Synchronization Settings from Maximizer or Administrator: Synchronization URL and the ability to add or remove mobile users from the Wireless Synchronization list.

38354 - MaxMobile Wireless Synchronization - Support Web Service Compression

To minimize bandwidth during Wireless Synchronization, data packets are compressed during wireless synchronization.

37573 - Support "Select MaxMobile User" for MaxMobile only Deployment

Support a scenario where there are fewer Maximizer desktop users than MaxMobile users by providing an interface for Maximizer users with Administrator role rights to set up a MaxMobile device for another user. When MaxMobile Synchronization is initiated and the current user has Administrator role rights, display the Select MaxMobile User dialog box. This configures the MaxMobile device for the selected MaxMobile user. MaxMobile is configured using the MaxMobile Settings defined under Preferences.

Note the initial Address Book Synchronization between the Mobile device that has MaxMobile installed and the Maximizer Address Book must be performed via USB sync. The MaxMobile users can perform wireless Synchronization with the configured Address Book thereafter.

34358 - MaxMobile - Install New .NET Framework Compact 2.0 SP1

Change the version of the .NET Framework Compact from 2.0 to 2.0 SP1.

35258 - Add Multi-user Licensing To MaxMobile

Support Product License Number (PLN) for MaxMobile products. A MaxMobile PLN is installed from the Administrator module using Utilities > Install Multi-user License dialog. In the User dialog add the 'MaxMobile' module login entry. This entry is used to enable or disable a user for MaxMobile synchronization.

36263 - Cradle Synch - Check 'MaxMobile' Module Login Value

Check the user's 'MaxMobile' module login setting when performing cradle synch. If 'MaxMobile' value is 'disabled' then when user attempts cradle synch display the following message "MaxMobile is disabled, please see your database administrator for permission to synchronize with MaxMobile."

35085 - Multi-Contact Appointment - GUI for PPC

Support the display and synchronization of the new multi-contact Appointment dialog fields in MaxMobile for Mobile Powered Pocket PC devices. Layout changes were made to introduce the new Address Book Entries tab, the new Products/Services and Categories fields, multi-line edit control for activities field. Furthermore, label changes were made for Appointments with Opportunity or Customer Service Cases, activity field was renamed to Subject and some minor changes were made to the Details tab in order to accommodate the display of multiple Address Book entries.

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2.2 MaxMobile for BlackBerry

34884 - Create MaxMobile Application for BlackBerry Devices

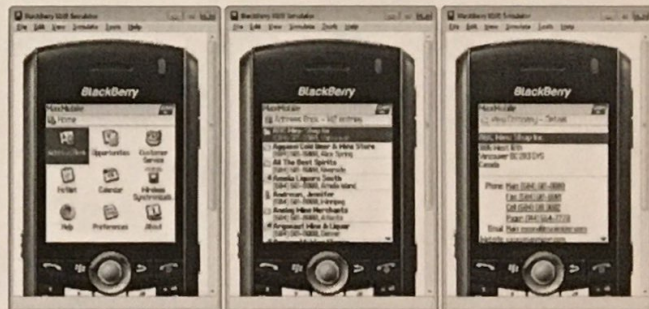
The new MaxMobile for BlackBerry product is a native application for BlackBerry 7000 and 8000 series devices. This feature is related to features: 34886 - Implement Address Book Window; 34889 - Implement Hotlist Window.

34886 - Implement Address Book window

This feature creates an interface to list Address Book entries, including the values for basic fields, UDFs, and add/modify/delete contacts in a company, activities, notes and documents. Feature includes:

Edit Menu - Add/Modify/Delete Address Book entries
Search Menu - Search functions
Action Menu - Make a Call, Schedule a Meeting, Schedule a To-do
Windows Menu - Links to other modules

This feature is also related to 34887 - Add, Delete Address Book entries; 34888 - View, Modify Address Book entries.



34889 - Implement Hotlist Window

Support Maximizer Hotlist window on BlackBerry. This feature is related to feature: 34890 - Add/Modify/Delete Hotlist Tasks.

34891 - Implement Calendar Window

Support Maximizer Calendar window on BlackBerry device. Calendar supports daily, weekly and monthly views in addition to go to specific date.

35086 - Implement Appointment Dialog

Support the Appointment dialog. Users can Add/edit/delete appointments in Calendar window. Add appointments in Address Book, Opportunities, or Customer Service window. Add, modify, delete, or complete appointments in Activities panel inside an Address Book, Customer Service Case, or Opportunity dialog. Furthermore, users may edit, delete, complete appointments in Hotlist window. This feature includes 35096 - Support Products/Services and Categories - Database changes.

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34896 - Support Alarm for Appointments and Hotlist Tasks

Support alarm for Appointments and Hotlist Tasks.

36556 - Support Activities in Address Book Entry, Opportunity, and Customer Service Case Dialogs

Implement the Activities panel in the Address Book Entry, Opportunity and Customer Service Case dialogs. The Activities panel displays Hotlist Tasks and Appointments. Activities may be completed and view options are available to Show carry forward unfinished activities, Show completed activities, and Show Appointments. In addition, options are available to filter activities by date, All dates, Today, Tomorrow, Yesterday, This Week, Next Week, and Custom.

34892 - Implement Opportunities Window

Feature includes:

- Interface to display Opportunities
- Creating the menu structure
- Implementing all the search functions
- Supporting sorting, filtering and view in Address Book
- Supporting phone call, send email and write a note actions

In addition this feature includes features: 34894 - Add, modify, and delete Opportunities and includes: Assign a contact to the opportunity, Edit UDFs, Edit status; 34893 - Support Adding and Deleting Opportunities.

**34897 - Support Customer Service**

Support view, add, modify, and delete Customer Service Cases; 34898 - Add/Delete Customer Service Cases; 34899 - View/Modify Customer Service Cases.

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36078 - Support Multi-contact Appointments

Support viewing multi-contact appointments in Wireless Access.

39576 - Check Module Login at Wireless Access Login

Only Maximizer users who's Web Access or Mobile module login setting is enabled may login to the Wireless Access.

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36310 - Support USB and Wireless Synchronization (Updated -- 36314)

Support USB and Wireless synchronizing of Maximizer data. This feature is related to features: 36310 - USB Sync - Sync Address Book entries; 35246 - Sync Data as Per Preference Settings; 35245 - Set Sync Preferences; 36312 - USB Sync - Sync Customer Service Cases; 36326 - Wireless Sync - Sync UDFs; 36324 - Wireless Sync - Sync Hotlist Tasks; 36323 - Wireless Sync - Sync Customer Service Cases; 36322 - Wireless Sync - Sync Opportunities; 36321 - Wireless Sync - Sync Address Book entries; 36313 - USB Sync - Sync Hotlist Tasks; 36311 - USB Sync - Sync Opportunities; 36314 - USB Sync - Sync Appointments; 36315 - USB Sync - Sync UDFs; 36316 - USB Sync - Sync Notes; 36325 - Wireless Sync - Sync Appointments; 36836 - Wireless Sync Handle Dropped Connection.

39626 - Support View Only During Scheduled Wireless Synchronization

During a scheduled wireless synchronization the Mobile user may open an Address Book entry, a Customer Service case or an Opportunity for viewing, but when an attempt is made to edit the entry display a message box. The message informs the user that a scheduled wireless synchronization is currently in progress and provides an option to cancel the synchronization in order to edit the entry or wait for the synchronization to complete.

In Hotlist and Calendar window when the user tries to open a Hotlist task or an Appointment the message box will be displayed. The message box will also be displayed if the user tries to open the Wireless Sync window.

39297 - Support Web Service Compression

Support compressing wireless synchronization data from MaxMobile for BlackBerry.

37867 - Support Carrier Specific Parameters for Wireless Synchronization

Allow the user to specify carrier specific parameters for the Synchronization URL of wireless sync.

36837 - Scheduled Sync for MaxMobile based Schedule Set on Device

Implement scheduled sync options for wireless synchronization. User can set scheduled sync frequency for Peak and Off-peak times. Scheduled Sync options are available from the Options menu under the Full menu.

39265 - Change Product Name from MaxMobile CRM to MaxMobile (BlackBerry)

Update the following areas with the New MaxMobile name: Icon in Programs window, the MaxMobile title bar in BlackBerry, and the MaxMobile About page in BlackBerry.

2.3 Wireless Access

34553 - Weekly Calendar View

Weekly calendar view has been added to the Wireless Access. In addition, an action menu has been added to support switching from daily and weekly views.

34551 - Allow the customization of the Search Results Screen

Allow the customization of the search results screen. Displayed fields will be determined by the selected Column Setup listed in the Web.Config file. Fields that may be shown include all Address Book Basic fields, and User-Defined Fields.

34552 - Add the Contact's Email Address and Telephone Number to Appointment Screen

Contact's email address and telephone number have been added to the Appointment screen of the Wireless Access. If the device supports telephony, telephone numbers will be clickable. Clicking the telephone initiates a phone call. Furthermore, if the device supports email, email addresses will be clickable. When the user clicks on the email address, the compose email screen appears and the To field is set with the Contact's email address. This behaviour may vary depending on which browser is used.

36024 - Products/Services and Categories - Appointment Screen

Support the Products/Services and Categories fields on the Appointment screen for the Wireless Access.

36025 - Products/Services and Categories - Add Fields to Opportunity Screen

Support the Products/Services and Categories fields on the Opportunity screen of the Wireless Access.

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3.0 Web

3.1 Maximizer Web Access Administrator

33159 - Setup Users

Support for managing users has been added to Maximizer Web Access Administrator. Administrators can add, modify, and delete users.

In addition, support has been added to:

- Set a user's Logging, Format, Calendar/Hotlist, Transfer, and Overview Page preferences
- Set the user's attributes (e.g. First name, Last name, Display name, Position, etc.)
- Define a user's Access Rights
- Assign user to Group/Teams
- Set a user's MaxExchange and Windows Authentication options

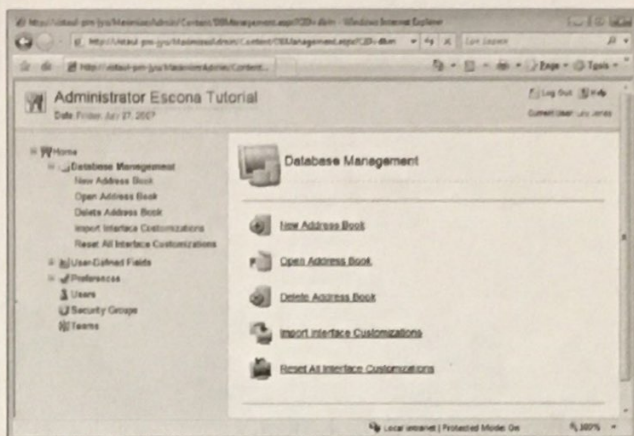
33145 - Setup UDFs

Setup User-Defined Fields (UDFs) have been added to the Maximizer Web Access Administrator. Administrators can move user-defined fields and folders, create, modify, delete user-defined fields and folder, add and delete items to table user-defined fields for Address Book, Opportunity, Campaign, Customer Service, and Users UDFs.

33143 - Database Management

The Database Management module has been added to the Maximizer Web Access Administrator. Support has been added to create, open, and delete an Address Book via Database Management.

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**34845 - Support Create New / Employ Existing Address Book**

The Create New / Employ Existing Address Book option has been added to the Log in to field on the Web Access login screen.

33150 - Locations and Resources

Locations and Resources support have been added to the Preferences section of the Maximizer Web Access Administrator. Users can add, modify, and delete values from the Locations and Resources.

33151 - Address Book Category

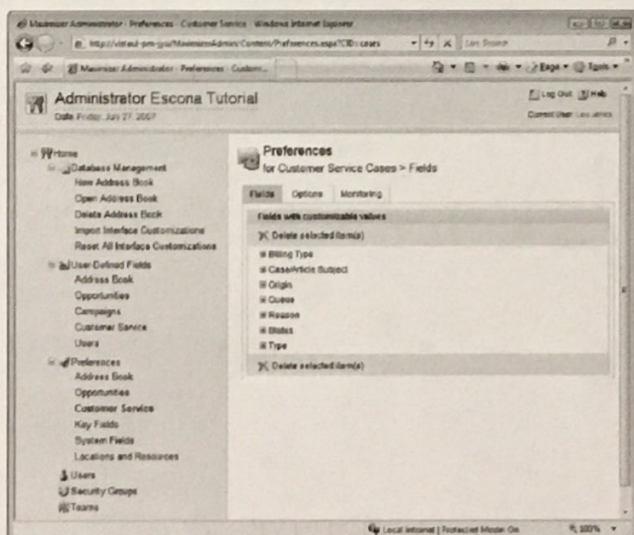
Address Book Category support has been added to the Preference section of the Maximizer Web Access Administrator. Administrators can add, modify, and delete Address Book Category values.

33153 - Opportunities

Support for Opportunities preferences have been added to Maximizer Web Access Administrator. Administrators can add, modify, and delete values for: Stages and probability of close, Confidence Rating, Complete reasons.

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**33156 - Key Fields tab**

Support for Key Fields preferences has been added to the Maximizer Web Access Administrator. Administrators can add, modify, and delete Key Fields lists for Address Book, Opportunity, Campaign, and Customer Service.

33160 - Setup Security Groups and Teams

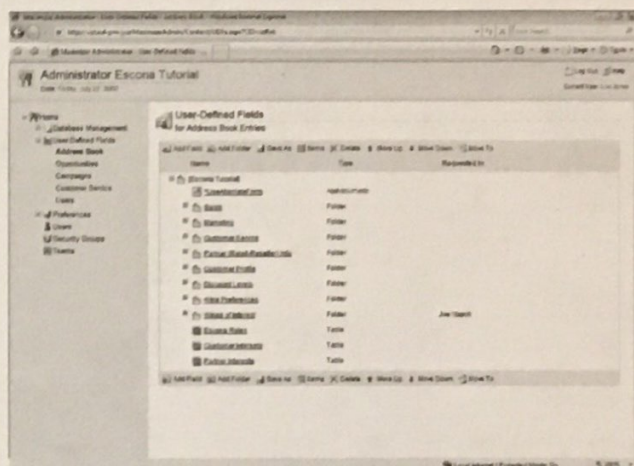
Support to add, modify, and delete Security Groups and Teams from the Maximizer Web Access Administrator has been added. Administrators can set the permissions, privileges, and members for a Security Group and Team.

34716 - Support Show Disabled Users option

The Maximizer Web Access Administrator can control if disabled users appear in the user control for the Appointment dialog. This is beneficial in environments where it is not necessary to display disabled users in Appointment user control, environments that are not using MaxSync for Microsoft Exchange for example. The Show disabled users option is located on the System Default tab under Preferences.

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**33149 - System Fields**

System Fields support has been added to the Preference section of the Maximizer Web Access Administrator. Users can add, modify, and delete values from the following system fields: Notes Category for Address Book, Campaign Notes Category, Customer Service Notes Category, Opportunities Notes Category, Do not solicit by, Products/Services, Categories, MaxExchange Distribution.

36478 - Support Categories Items as Sub-items to Products/Services Items

The Maximizer Web Access Administrator can set Categories items as sub-items to Products/Services items. This option is available under Preferences > System Fields page of the Maximizer Web Access Administrator.

38547 - Support Administrator Preference to Set IMAP and SMTP servers

Support the Maximizer Web Access Administrator setting the IMAP or SMTP servers setting by providing the "Email Server Setting" option under Preference. When the IMAP or SMTP server settings are defined in conjunction with feature 38546, the Maximizer Web Access user is automatically logged into the email server when any of the Maximizer Web Access email features are used.

33154 - Preferences - Customer Service

Support to manage Customer Service options has been added to the Maximizer Web Access Administrator. Administrators can add, modify, or delete values for case details fields: Billing Type, Case or Article Subject, Origin, Queue, Reason, Status, and Type. In addition, Administrators can set case options and specify users for case monitoring. This feature is related to feature: 33657 - Customer Service Monitoring.

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39218 - Support Search For User

A Search For option has been added to the User list page of the Maximizer Web Access Administrator. Administrators search for a Maximizer user by entering a value into Search For field and clicking the Search button. The search results are based on a match between the Search For value and any one of the following user fields: User ID, Display Name, First Name, and Last Name. If the Search For field is blank and the user clicks the Search button, all users will be retrieved. Alternatively, clicking the Retrieve All Users button also retrieves all users.

34719 - Support Users and Groups in Multi-Contact Appointment

Support adding user and group in multi-contact appointments.

35056 - Enforce User/Group Setup Rights & GUI Improvements

Update the Maximizer Web Access Administrator module to allow the Administrator the same User/Group Setup rights as the desktop Administrator module.

33657 - Customer Service Monitoring

Support for Customer Service email notification preferences has been added to the Maximizer Web Access Administrator. Administrators can add, modify, and delete email templates as well as assign and un-assign email templates for the following case actions: Create, Assign, Escalate, and Resolve.

3.2 Maximizer Web Access**32079 - Support Email Window in Maximizer Web Access**

The Email window is completely server-based and supports SMTP and IMAP. The Email window is accessed by clicking the Email icon located on the icon bar of the Sales, Marketing and Service tabs. Users specify email login credentials (Server, User Id, and Password) via Email login page. Alternatively, users may save their IMAP or SMTP Server login credential via the Preferences dialog (38546) for automatic Email login. Email window consists of two panes; the left pane displays the available email folders and the right pane displays the emails of the selected email folder.

35921 - Email Windows Support - Compose Email dialog

The Maximizer Web Access Compose Email dialog supports sending plain text or HTML emails. Add a menu named 'Compose New Email' to the Edit menu of the Email Window. Email attachments are added via a toolbar button on the Send Email dialog.

In HTML format, user has access to:

- Font settings: Paragraph, Font, and Size
- View the message in either "Design" mode in which formatting is shown, or "HTML" mode, in which the HTML markup is shown. These modes are accessed via tabs at the bottom of the editor pane.

38917 - Support HTML, Merge Field, and Other Features in Existing Compose Email Dialog

Update the existing Compose Email dialog accessed from the Web Access Address Book screen with HTML (Rich Text) control, merge field option (feature 36152), and Address Book look-up for To, CC, and Bcc fields (feature 36118).

36138 - Support View Menu and View Bar for Email Window

Add the View menu and a filter control to the Email window to allow users to filter emails (All Emails, Today's Emails, Yesterday's Emails, This Week's Emails, and This Month's Emails)

36105 - Support Move to Folder in Email Screen

Users are able to move to a single email to another folder from the Email screen. The new Edit > Move to Folder menu option displays the "Move Item" dialog that allows the user to specify the target folder. The selected target folder (after being clicked) is bolded. This selection is maintained for the life of the session. Folders which can't be a target folder for the current message are shown in italicized light blue.

36118 - Support To, CC, and Bcc in the Send Email dialog

When either To, Cc or Bcc button is clicked on the Compose New Email dialog, display the Add Email Recipient dialog box. The desired email recipient (Address Book entry) can be searched by Last Name, or Company.

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38546 - Support SMTP and IMAP User IDs and Passwords Fields

Allow the Maximizer Web Access user to specify their SMTP or IMAP User ID and Password by adding these fields to the Email tab under Preferences.

33661 - All Sites - Support Windows Authentication Mode for SQL Server

Support Windows Authentication for SQL Login for all Sites. Note Windows Authentication or Single Sign On is not supported in Group Edition.

36152 - Support Email Merge – Maximizer Web Access Compose Email Dialog

User clicks the Insert Fields button from the Compose Email dialog for a list of available merge fields. Merge field is populated when email is sent.

32298 - Dialog Load Time Improvements (caching option lists)

Optimization have been made by caching list options for the Address Book, Custom Service, Opportunity, New Appointment, Column Setup, New Knowledge Base Article, and Search (that include list) dialogs.

26032 - Territory Management (configuration)

Allow Sales Managers to add, modify, and delete setup territory rules and define alignment conditions for Address Book entries. This feature is related to: 34882; 38253 - Territory Management available in the Enterprise Edition only.

34882 - Territory Management (Search and Alignment Conditions)

Support searching for Address Book entries by territory and support territory alignment conditions within the Maximizer Web Access.

35070 - User Preferences - Personal Settings Only

Support the ability to view and edit personal preferences through the Employee Portal. All existing calendar preferences including: Default calendar view, working hours/days, Calendar access, Hotlist carry forward unfinished tasks is available to the user. In addition, email preferences with relevant email options are also available to the user.

34682 - New Calendar View; Weekly List View

The Weekly List view displays appointments and appointment details for one week. All days of the week are displayed starting with Monday.

34718 - Support Multi-Contact Appointments

The Appointment dialog has been updated to support the new appointment feature; Multi-contact support, Products/Services and Categories, Activities.

34687 - Support Two Level Security on Favorite Lists

A favorite list now supports two levels of security; Full access and Read access. Full access provides the assigned user (or security group) the ability to modify or delete the favorite list. Read access provides the assigned user (or security group) the ability to see and use the favorite list.

34691 - Support Two Level Security on Column Setups

A column setup now supports two levels of security; Full access and Read access. Full access provides the assigned user (or security group) the ability to modify or delete the column setup. Read access provides the assigned user (or security group) the ability to view and use the column setup.

34689 - Support Two Level Security on Search Catalogs

A search catalog now supports two levels of security; Full access and Read access. Full access provides the assigned user (or security group) the ability to modify or delete the search catalog. Read access provides the assigned user (or security group) the ability to view and use the search catalog.

33868 - Allow User to Turn Off the Tabs in the Icon Bar

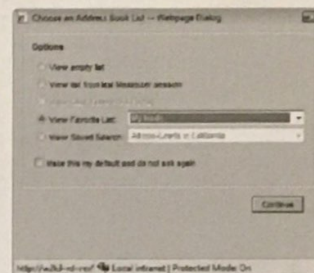
The user can choose to turn off the three main tabs (Sales, Marketing and Service) in the Icon Bar Properties dialog box. Access to the different modules is via a drop-down. Note that individual tabs may be hidden if the user does not have access rights to those modules. This feature is related to feature 16168.

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35567 - Ask at Start up Which Address Book List to View

Support the "Choose an Address Book list to view in the Address Book window" in the Maximizer Web Access. List options are View Empty list, View list from last Maximizer session, View Last Search, View Favorite List or View Saved Search.

**35065 - Custom Field Labels (including Import GUI)**

This feature includes support to Import Interface Customizations and Reset Interface Customizations in the Web Access Administrator module in order to display string customization in the Portals. This feature is related to 32201 and 34245.

33111 - Login Page; Default Address Book

A new configuration setting named "DefaultAddressBook" has been added to Web.config file for the Maximizer Web Access. This setting specifies the default Address Book for the "Log in to" combo box on the Login page. Note in cases when the preset Address Book is defined or user has the "Remember me" checkbox set the "DefaultAddressBook" setting is ignored.

35123 - Support Set up UDF via Maximizer Web Access

Support Set up User-Defined Fields has been added to the Maximizer Web Access.

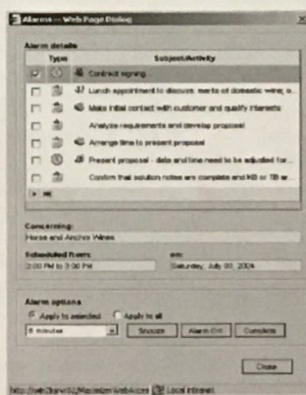
36089 - Multi-Contact Appointments - Calendar

Support the display of Multi-Contact Appointments in Calendar; Daily and Weekly list view. Include Address Book entries in tooltip, email reminder, and when logging notes.

32220 - Support Hotlist Task and Appointment Alarms in Maximizer Web Access

Support alarm notification while logged into the Maximizer Web Access from both Hotlist Tasks and Appointments.

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**33634 - Document Category Field: Maximizer Web Access**

The Maximizer Web Access supports the new Documents Category field. User Access to this system field is controlled from Maximizer Web Access Administrator.

33869 - Ability to Set UDF Folders, Items, and Fields as Active/Inactive

Each user may specify if hidden UDF Folders, UDF fields, and table items are to be shown. An exception to this rule is that mandatory UDFs cannot be hidden.

36121 - Support Spell Checking in Maximizer Web Access Email

Support spell checking for plain text or HTML messages in the Compose Email dialog.

32274 - Use ASP.NET 2.0 Tree Control

The tree control used in the UDF tab, Links and Company Library screens have been updated to use the tree control available ASP.NET 2.0. This provides a consistent look for all tree controls in the Portal. Additional benefit is delayed loading until a folder is clicked in UDF and Company Library. This feature is related to feature 32542 - (Portals) Use ASP.NET 2.0 Tree Control - Search All Fields and Column Setup.

35205 - Optimize Various Screens/Functions

The following areas have been optimized to reduce the amount of time to complete: Calendar views: Loading the Calendar windows for the first time, switching from one view to another view (except monthly). Calendar > Edit List dialog: Displaying the Edit List dialog box. My Work Day: Loading the My Work Day page. Hotlist: Loading the Hotlist Task dialog box, switching from one user's Hotlist Task to another user's Hotlist Task. Hotlist > Assign Dialog: Loading the Assign User dialog box, selecting a user. Hotlist > Reassign Dialog: Loading the Reassign dialog box. Alarm Dialog: This part does not have an obvious improved, however, there is a bit of an improvement. Optimization

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is required when the Alarm dialog and Calendar Windows are loading at the same time. Appointment Dialog: Loading the Appointment dialog box while Grouping is enabled, selecting a user in the Users tab.

32574 - General Performance Improvement in the Portals and Middle Layer

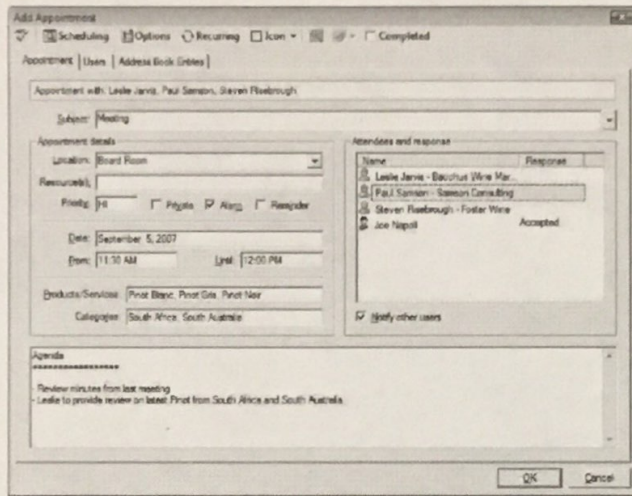
General performance improvements have been made in the portals and middle layer.

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4.0 Address Book

35074 - Support Multi-Contact Appointments

The ability to schedule a single appointment with multiple contacts (users, Address Book entries) has been added throughout the product. Feature related to 35078, 35075, and 35076.



35075 - Multi-Contact Appointment - Appointments related dialogs

Update existing Appointment related dialogs to support Multi-Contact Appointment feature. Affected dialogs are: Appointment alarm dialog, Appointment notification dialog, and Peg Board dialog.

17171 - Group Users - Multi-Contact Appointment Dialog

Create a control that displays users by the following groupings: All Users, Departments, Divisions, and Security groups under the Users tab of the Appointment dialog.

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34560 - Group Users - Multi-Contact Appointment Dialog

Support additional groupings for Teams, MS Exchange Users, and Disabled Users under the User tab of the Appointment dialog. Differentiate between enabled, disabled, and MS Exchange users using icons. Preferences options allow Maximizer user to hide or display these groupings. Note the MS Exchange Users tab is only available when MaxSync for Microsoft Exchange has been activated.

35076 - Multi-Contact Appointment - Action Plan dialog

Update Action Plan dialog to support Multi-Contact Appointments.

35077 - Multi-Contact Appointment - Text Field

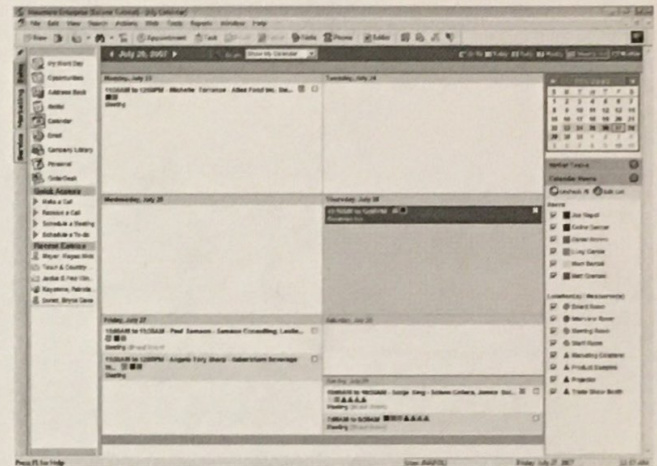
Support a text field at the bottom of the Appointment dialog box. Users may enter appointment related information for all users to see. This field is synchronized with Outlook Synchronization and MaxSync for Microsoft Exchange.

34558 - Products/Services and Categories fields Added to the Appointment dialog

Support Products/Services and Categories fields have been added to the Appointment dialog box.

34588 - New Calendar View; Weekly List View

The Weekly List view displays appointments and appointment details for one week. All days of the week are displayed starting with Monday. This feature includes 34682 - New Calendar View; Weekly List View.



33541 - Show Tooltip when Mouse-Over the User Drop-down List

The tooltip can be used to display the user's name when the selection is too long to fit in the Calendar window User drop-down list.

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34717 - Support Products/Services and Categories Fields in the Opportunity/Customer Service Case/Appointment dialogs

Support Products/Services and Categories fields in the Opportunity/Customer Service Case/Appointment dialog box.

34546 - Support Two Level Security on Favorite Lists (Update)

A favorite list now supports two levels of security; Full access and Read access. Full access provides the assigned user (or security group) the ability to modify or delete the favorite list. Read access provides the assigned user (or security group) the ability to see and use the favorite list.

34548 - Support Two Level Security on Column Setups (Update)

A column setup now supports two levels of security; Full access and Read access. Full access provides the assigned user (or security group) the ability to modify or delete the column setup. Read access provides the assigned user (or security group) the ability to view and use the column setup.

34547 - Support Two Level Security on Search Catalogs

A search catalog now supports two levels of security; Full access and Read access. Full access provides the assigned user (or security group) the ability to modify or delete the search catalog. Read access provides the assigned user (or security group) the ability to view and use the search catalog.

38830 - Support SKU/Reference Number field in Add/Modify Catalog Item Dialog Box

Provide a field labelled SKU/Reference Number to the Add/Modify Catalog Item Dialog Box. When a catalog item is added to an OrderDesk order, quote, or item inquiry, the Item code field is populated with the SKU/Reference Number value.

35029 - User Can Create or Connect to a New Address Book

From a Maximizer CRM Workstation, a user can now connect to a shared Address Book or create a new Address Book from the Maximizer CRM Enterprise without having to open the Administrator module.

35233 - Delete Recurring Appointment

The Delete Recurring Appointment dialog box has been updated to include a new option: Delete occurrences that have not occurred.

36433 - Appointment Details Reports

The Appointment Details and Appointment Full Details Reports have been updated to support the new Appointment fields; Products/Services and Categories, multiple Address Book entries, and Activities. These reports are accessed from the File > Print > Appointment Details menu when the Calendar is the controlling window.

39644 - New Reports

- Sales Quotes - Expired by Date Range: This report displays Sales Quotes that have expired within the past 30 days, 31 to 60 days, 61 to 90 days, or 90 plus days. This report is available from the OrderDesk window.
- Automated Email Campaign Response - This report displays the Automated Email Campaign statistics by displaying the recipient's Email Open and Click through activity. This report is available from the Reports > Crystal Reports > Marketing menu.
- Sales Quote - This report displays a single Sales Quote. This report is similar to the existing Order Report but includes Sales Quotes specific fields like Discount and Expires after date. Report is available from OrderDesk.
- Opportunity (Won) - Leader - This report is similar to the Opportunity Pipeline report but for won opportunities. Report is available from the Reports > Crystal Reports > Sales menu.
- Favorite Lists - Reports on the favorite lists for the current user. This report is available from the Reports > Crystal Reports > Administration menu.
- Column Setup - Reports on the column setups for the current user. This report is available from the Reports > Crystal Reports > Administration menu.

35040 - Store vertical packs in SQL

Vertical Packs are now in Microsoft SQL format.

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39529 - Create Help -> Other Products Dialogs for Products

Create Help -> Other Products dialogs for the products: MaxMobile for BlackBerry, Maximizer CRM Workflow Automation powered by KnowledgeSync, Maximizer Web Access, Maximizer Wireless Access, Maximizer Partner Access, and Maximizer Customer Access.

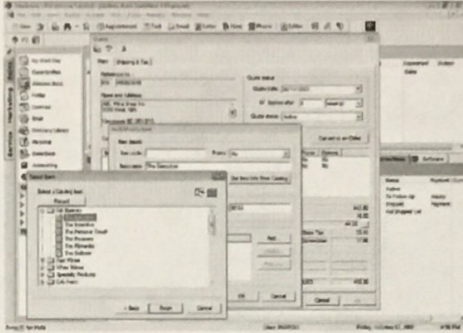
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5.0 Sales

32199 - Support Sales Quotes

Support for Sales Quotes has been added to OrderDesk. Sales quotes can be generated for an Address Book entry or the Address Book entry of an Opportunity. A quote supports status properties like: Expires after, Quote date, and Quote status. The Quote status field has two user values (Active or Inactive) and one system value, 'Expired'.

Sales Quote items can be manually entered or read from a catalog (features 36345 and 39334) using the Get Item Info from Catalog option on the Add/Modify Item dialog. Discounts may be applied to a sales quote and a quote can be converted into an order.



Three sales quote reports have been added: Sales Quote (39644), Expiry Date Approaching (39644), and Expired by Date Range (39635). The Sales Quote report can be used to print-out a single sales quote. Alternatively, Microsoft Word can be used to print-out a sales quote using sales quote templates (39337) or by using merge fields (39148 and 38076) available from the Maximizer Toolbar in Microsoft Word.

36345 - Support Adding and Editing Catalog Project from the OrderDesk window (New/Updated)

Support adding and editing catalog projects from the OrderDesk window by adding a menu named Product Catalog to the edit menu. When this menu is selected display the Product Catalog dialog box and allow the user add or edit Catalog projects that in turn, can be inserted into an OrderDesk order, item inquiry, or quote via the 'Get Item Info from Catalog' button. This feature includes 40155 - Rename Edit menu item from Catalog and Items to Product Catalog.

39334 - Support UI to Specify Catalog Project Location for OrderDesk

Provide an interface that allows the OrderDesk user to specify the catalog source when adding items to orders, item inquiries or quotes via the Get Item Info from Catalog button (feature 36345).

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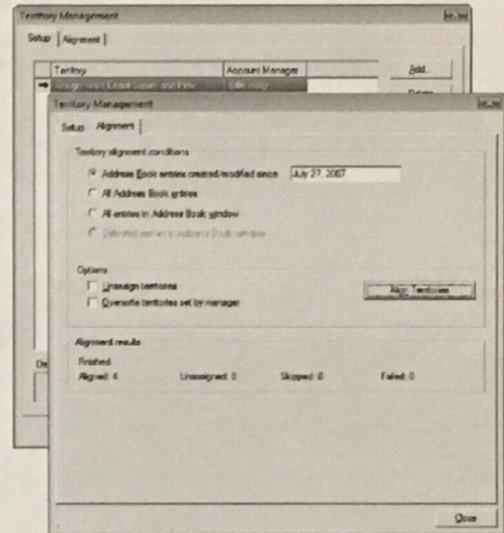
On the Other System Options dialog box - which is accessed under File > Preferences - add the following options for Professional and Enterprise Editions: eStore, Maximizer CRM, and ecBuilder. For Group Edition provide the Maximizer CRM and ecBuilder options only.

38076 - Support Creating Sales Quotes Items Table Merge Field

Sales Managers or Sales Reps can define an item table merge field for OrderDesk Orders and Sales Quotes. Defined item table merge fields can then be merged into a Microsoft Word document using the Maximizer Toolbar in Word. The OrderDesk - Items Table Merge Field Setup feature is available from the Edit menu when the OrderDesk following window has control.

08642 - Territory Management

The new Territory Management feature allows Administrators or Sales Managers to assign Address Book entries to a territory. An Address Book entry can be manually or automatically assigned using assignment rules and alignment conditions. Users can search Address Book entries by territory, include territory and territory status fields in column setup. This feature is related to features: 26032 - Territory Management (configuration); 34882 - Territory Management (Search and Alignment Conditions); 38252 - Territory Management available in the Enterprise Edition only.



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39403 - Territory Management Report

This report located under the Reports > Crystal Reports > Sales menu displays all companies and individuals group by territory. This report is available for Enterprise editions only.

39635 - Sales Quote Expiry Date Approaching Report

This report allows Sales Reps and Sales Managers to report on active sales quotes order by expires after date ascending.

37731 - Update Escona Tutorial with New Data

The Escona Tutorial Address Book, which is the Address Book for the fictitious company Escona Estates Winery, has been updated with new operational and structural data. New operational data has been created for Appointments, Hotlist Tasks, Sales Quotes, Opportunities, Customer Service Cases, Marketing Campaigns, etc. Structural data has been updated for existing features like Action Plan templates, Dashboards, Users and new structural data has been added for new features like Territory Management and Sales Quotes.

27261 - Add Dashboard section for My Work Day

Add a Dashboard tab to My Work Day screen to allow the display of dashboards.

39148 - Support Creating Sales Quotes Items Table Merge Field

Add 'Expires after', 'Quote status', and 'Discount Total' merge fields to the Insert Merge Field dialog of the Maximizer toolbar from Microsoft Word. In addition, add 'Item Options (Line separated)' and 'Item Options (Comma separated)' options to the OrderDesk - Item Table Merge Field Setup (feature 38076).

39337 - Default Item Table Merge Field & Sales Quote Template Microsoft Word

When an Address Book is created or upgraded to Maximizer CRM 10, create two OrderDesk - Item Table Merge Fields definitions: Advanced Item Table and Simple Item Table. These item table merge fields can then be used from Microsoft Word to create Sales Quotes documents. Two Microsoft sample Sales Quotes templates are available from the New > Template > Maximizer tab within Microsoft Word. These templates illustrate the use of the item table merge fields as well as other Sales Quotes merge fields.

25825 - Dashboard Interface Improvements

The following dashboard interface improvements have been made:

- Support different color for the Color bar, color for the Color bar selection is available from properties page
- Display the current dashboard file name in the General tab of the properties dialog box
- Support target indicator for desired level for gauge. Note not all gauges support target indicator
- Allow user to save the settings for each indicator as well as saving dashboard properties in My Work Day

33522 - Dashboard: Support Horizontal Scroll Bar in Properties Dialog

Horizontal scrollbars have been added to the Available Indicators and Current Indicators controls on the Properties dialog box for Dashboards.

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6.0 Marketing

11184 - Show Opportunity revenue (In Progress and Won) for specific Campaign(s)

Show Opportunity revenue (In Progress and Won) for specific Campaign(s).

32143 - Direct Insert option Added to Web Inquiry Form Wizard

The Web Inquiry Form Wizard now supports the direct insert of Web Form data into an Address Book.

22873 - Add Maximizer Word Process Template Support for Microsoft Fax

User may now use Maximizer Word Process templates (.etf) when creating Automated Fax Campaign that uses Microsoft Fax service. Previously, only Microsoft Word templates were supported.

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7.0 Administration

16485 - New User Role: Administrator

A user with the Administrator role can open the Administrator module and perform many of the tasks previously only possible by the MASTER user.

09820 - Modify System Tables

The "Modify system tables" permission controls if the Maximizer user can edit system tables. When "Modify system tables" option is off, [Edit List...] does not appear in the drop-down lists for system tables.

16168 - Allow the User to Turn Off the Tabs in the Icon Bar

Allows the user turn off the tabs in the Icon Bar. When tabs are turned off the Icon Bar is expanded, the gray vertical bar for tabs is hidden. The pin and the current module name will be displayed inside the Icon Bar. The user switches to a different module by using the drop-down menu.

23924 - Database Validation: Correct MaxExchange UDF assigned to Contacts Case Scenario

Additional validation has been added to the Verify Address Book to correct an invalid scenario of Contacts being assigned to the MaxExchange Distribution field.

34576 - Allow Transfer, Allow Import, and Allow Export

The Allow transfer and import/export access right has been divided into separate entities in the user's or group's access rights: Allow transfer, Allow import, and Allow export. This allows an Administrative to permit users to import but not export or allow transfer without import or export or any other combination.

35574 - Support Accounting and Mobile Columns in Users Dialog

After Accounting Link has been installed an Accounting column appears within the Users dialog box. After MaxMobile has been installed a Mobile column appears within the Users dialog box. In both cases the column displays either Enabled or Disabled indicating the user's access. In addition, the Accounting and Mobile options appear in the Module login for the both the Maximizer Web Access Administrator and Administrator.

35039 - Simplify the Create a New Address Book Wizard

Simplify the Create New Address Book wizard to support new SQL database options.

39317 - Support Document Administration

The Document Administration feature is available from the Administrator module and supports converting document over a specified size to a linked document; moving the document from the Address Book to a specified folder.

35092 - Support Products/Services and Categories relationships

The administrator can set Categories to be sub-items of Products/Services.

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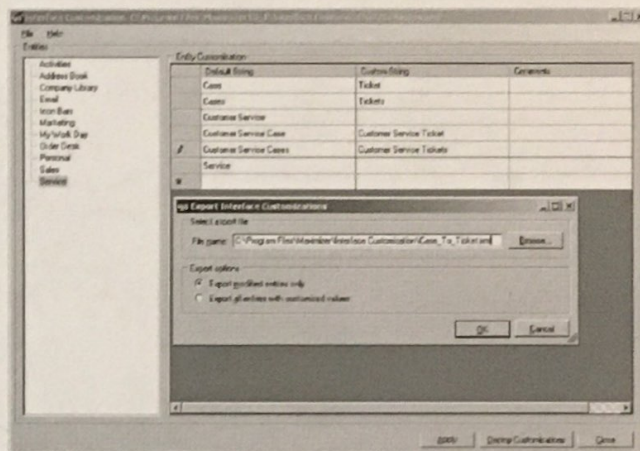
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8.0 Customization

32201 - Custom Field Labels

Upon the installation of the Customization Suite the Interface Customization application is installed. This application allows the modification of dialog, window, and menu labels. Interfaces customizations are exported and then imported into the desired Address Book via the Administrator (34245) or Web Access Administrator (35065). All users of an Address Book in which has been customized in this fashion will see the changes, the Customization Suite is only required for administering the changes.

Note custom labels made with this new feature take precedence over those created with the old Custom Interface feature.



34245 - Support Import of Custom Field Labels

Support the import of custom field labels created by the Interface Customization program (32201). Add two menu options under the File > Import menu in the Administrator module: "Interface Customization" and "Reset all Interface Customization". The "Interface Customization" option is used to import the file of custom field labels desired. The "Reset all Interface Customization" option removes all custom field labels for the current Address Book.

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36715 - Custom Label - Sites

Support the display of custom labels (32201 - Custom Field Labels) in sites: Partner and Customer Access, Maximizer Web Access and Maximizer Web Access Administrator.

33713 - Maximizer Web Services

Maximizer Web Service allows third party developers to exchange information with Maximizer CRM over HTTP. Maximizer Web Services support some of the Address Book related methods exposed by the Maximizer Data object.

32579 - OLE Automation: Additional Searches

New searches for Customer Service Cases: CSSearchByCreator, CSSearchByLastModifyDate, CSSearchByNumber, CSSearchByUDF and Knowledge Base Articles: SearchByNumber, SearchByCreator, SearchByLastModifyDate have been added.

33562 - User Object Enhancements (Maximizer.data)

Insert method of User object supports creating a user that can inherit properties from another user.

33563 - ReadUserView Implementation with Static Column Setup

Added a new function named ReadUserView to ColumnSetupAccess object to support return of the DataTable object which contains the list of user.

33667 - OLE Automation: Document Functions Updated with New Category Field

Documentation has been updated to support the new category field:

- AddOLEDocument
- GetDocumentDetailsEx
- UpdateDocument

34705 - New OLE Automation Hook: ApptButtonHook

The ApptButtonHook allows integrators to add a button with a custom label to the Appointment dialog. When this button is clicked, custom action can be implemented. This feature is related to feature 34709.

34709 - Support New ApptButtonHook

The ApptButtonHook is supported in the Portal Appointment dialog. Button visibility and label caption is controlled via Web Config. Button logic is controlled via AppointmentHook.js.

35080 - Support Multi-Contact Appointments

Appointment related functions have been added or updated to support multi-contact appointments via Customization Suite. New functions: AddABEntry, DelABEntry, GetABEntryList, AddUser, DelUser, GetUserList. In addition, feature 35087 includes the following new functions: New OLE Automation function (AddAppointmentEx2), a New MaxAccess AppointmentDataObject function (GetAppointment3), and a new EventsHook function (NotifyAppointment2).

35099 - Support Products/Services and Categories

The following functions have been added or updated to support the retrieval of Products/Services and Categories fields:

- SetCustomerServiceFieldValue
- GetListOfModifiableUDFTableItems
- GetListOfUDFTableItems
- GetListOfUDFTableItemsDep

The GetListOfUDFTableItemsDep function was added to support the Products/Services <-> Categories relationship.

39041 - New Accounting Link Documentation

The Customization Suite Guide has been updated to include the new functions and methods associated with the new Accounting Link for Microsoft Dynamics GP.

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39790 - Customization Suite Installation changes for Maximizer CRM 10

The Customization Suite installation has been modified into a single installation type. The Customization Suite now consists of two manuals; Volume I and Volume II.

36076 - Document Late Binding Methods and Include Sample Code

The Customization Suite has been updated to include documentation and sample code on Early and Late Binding for MaxAccess Object.

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9.0 Architectural

09809 - Support Windows Authentication Mode for SQL Server

When a Maximizer User is configured to use Windows Authentication, they are automatically logged into Maximizer and the SQL Server; SQL Server set to Security Mode of "Windows Authentication mode" (SQL Server 2005) or "Windows only" (SQL Server 2000). Note: 38260 & 38300 - Windows Authentication and Single Sign On is not supported by Maximizer CRM Group Edition.

35043 - Installation to Embed MS SQL Server Express

Where previously the Pervasive SQL database engine would have been installed now install Microsoft SQL Server Express.

38243 - Create Installation for Three Editions of the Maximizer CRM

Support three product editions: Maximizer CRM Group Edition, Maximizer CRM Professional Edition and Maximizer CRM Enterprise Edition. The installation determines which edition to install based on the PSN specified during installation. This feature includes: 38240, 38235 - Reporter Module Available in Maximizer CRM Professional and Enterprise Edition Only; 38236, 38259 - KnowledgeBase Module Available in Maximizer CRM Enterprise Edition Only; 38252, 38253 - Territory Management available in the Enterprise Edition Only; 38254 - Fax/Print Campaigns Available in Enterprise Edition Only; 38251 - Update Installation Wizards with New Product Name. This feature is related to feature 39450 - Group Edition does not support SQL Analytics or Reporting Services.

23578 - Database/User Creation Creates Default Records of all Types

This functionality is beneficial for a number of reasons:

- MaxExchange no longer has to check if Default Entry records have been created at different locations at the same time.
- Administrators can easily edit any User's Default Entry record with the "Edit All Default Entries" menu selection. Currently an admin needs to force the creation of the record(s) first.

38616 - Perform Address Book Size Check at Start-up (SQL Server Express Only)

When Maximizer CRM is started, perform a check to determine if the Address Book is reaching the size limitation imposed by the underlying database server. In cases where the Address Book size is approaching the size limit, display a message with information on how the Address Book size may be reduced or upgraded. This feature is related to 38617 - Perform Address Book Size Check at Start-up (Maximizer Web Access).

38988 - Support Option to Disable the SQL Express Address Book Size Check on Login

Add a "Don't ask me again" checkbox to the Address Book Size Check dialog to allow the Address Book size check procedure to be disabled. Add the "Check Address Book size at login" check box to the System Defaults tab under Preferences to allow the Address Book size check to be turned back on. This feature is related to 38989 - Support Option to Disable the SQL Express Address Book Size Check on Login (Maximizer Web Access). For Web Access, the "Check Address Book size at login" option is located under Personal Preferences dialog (Options > Personalize).

38612 - Support Upgrade Address Book - Convert Documents Utility

This utility can be used to reduce the size of a Maximizer Enterprise 9, or 9.5 Address Book before upgrading to Maximizer CRM 10 by converting embedded documents to linked documents. This is important for Maximizer CRM 10 Group Edition for which the underlying SQL Server Express database server imposed size limitation.

38615 - Maximizer CRM DB Sizing Estimation

This standalone utility is used prior to upgrading a Pervasive database to estimate the size of the database when converted to a SQL Server database. This is particularly important when upgrading to Maximizer CRM Group Edition as the workgroup engine (SQL Server Express) has a 4.0 GB database limit.

37107 - Install .NET Framework 3.0

Support installation of .NET Framework 3.0

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10.0 Productivity Improvements

32367 - Add Column Setup Support to the Hotlist Window

Support column setup in the Hotlist window.

38604 - Add New Basic Fields to the Hotlist Column Setups

The following Address Book related fields have been added to the Basic Fields tree of the list of available fields for a Hotlist column setup: Full Access, Read Access, Address Line 1, Address Line 2, City, State/Prov., Country, Zip/Postal, and Account Manager. The Full Access and Read Access represent the rights of the Address Book entry that is associated with the task or appointment. If the task or appointment is for a case or an opportunity, these two columns display the access rights of the Address Book entry that is associated with the case/opportunity. If the appointment is a multi-contact appointment, these two columns are blank. The following task/appointment related fields have also been added: Creation Date and Creator.

34554 - Add Support for a Global Remove from Within the Global Edit Dialogs

Support the global remove of User-Defined Fields values via the global edit dialogs for Campaign Manager, Customer Service, Opportunities, and Address Book modules.

26154 - Document Category Field

When adding/inserting a document into the Documents window, the user can specify a category. Documents can then be searched by category. The Administrator creates the list of category values for this system field. Note that this feature does not include any GUI changes for the Company Library module.

25482 - All Methods of Sending Email Follow Preferences for Saving of Note or to Documents

All methods of Send / Write / Reply / Reply All / Forward to Email always follow the Save Note or to Documents defaults set by the Email Preferences.

16177 - Search for No Value (Desktop only)

Provide the ability to search basic fields and User-Defined Fields for no value. Add the 'Search for No Value' check box to the dialogs for specifying value(s) to search for. When Search for No Value is selected, search returns records where no value has been assigned. This is supported for Address Book, Customer Service, Opportunity, and Campaign Window.

34160 - Move Redundant Text at the Beginning of History Email Note

The format of a history email note has been changed. The text "An email has been sent to 'Address Book entry <email address>...' " has been moved to the end of the history note after a separator and carriage return.

37425 - Increase Auto-Signature Character Limit to 5000 Characters

The Auto-Signature field now supports up to 5000 characters.

25742 - Duplicate Checking: Support for All Email Addresses and All Phone Numbers

The "All Email Addresses" and "All Phone Numbers" options have been added to the list of fields to match.

11250 - Support Show Hidden for UDF Folders and UDF Fields

Add the "Show hidden field" check box to the User-Defined Field (UDF) window, to the Select Field for Search dialog box, and the Select Table Field Values for Search dialog box to allow users to show hidden UDF fields. The "Set to hidden" attribute is used to denote that UDF is hidden. This feature is related to 09367 - Support Show Hidden for User-Defined Fields (Database).

Note a UDF is always displayed when the field is currently selected or when it is mandatory.

32288 - HTML Spellchecker

HTML spell checking has been added to the Compose Email dialog box.

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35034 - Changing Password - Group Edition Only

When a user changes any user's password and there are multiple Maximizer Address Books on the server hosting the Address Book, the password will be changed for that user in all of the Address Books.

38249 - Update Labels, Captions and Graphics to Maximizer CRM

All occurrences of Maximizer Enterprise are to be changed to Maximizer CRM. This feature is related to 38250 - Update Labels, captions and graphics to Maximizer CRM (Thin).

39264 - Change Product Name from MaxMobile CRM to MaxMobile

On PPC and Smartphone device, the product name is changed from MaxMobile CRM to MaxMobile. The three mobile product names are:

- MaxMobile for BlackBerry
- MaxMobile for Windows Pocket PC
- MaxMobile for Windows Smartphone

This feature includes 39265 - Change Product Name from MaxMobile CRM to MaxMobile (BlackBerry); 38892 - Change MaxMobile CRM to MaxMobile (Installation).

39306 - Change Product Name for Portals

The following product name changes have been made in the application and documentation:

- Employee Portal has been changed to Maximizer Web Access
- Partner Portal has been changed to Partner Access
- Customer Portal has been changed to Customer Access
- Wireless Portal has been changed to Wireless Access

When collectively referring to these products the term 'sites'. This feature includes feature 39328 - Change Product Names for Portals in Maximizer CRM.

39566 - Update Properties Dialog Box Labels

Update the following labels in the Properties dialog box: In the module Login section change Maximizer to Windows Access, change Portal to Web Access, and change MaxMobile Synchronization to Mobile. In addition update corresponding label on the Users dialog box and the Install Multi-user License dialog box.

39405 - Maximizer Web Access to Respect Trial

Maximizer Web Access supports trial version by checking the trial status of Maximizer CRM. If Maximizer CRM is a trial then display a trial status page with a Continue button, the Continue button is not available if the trial has expired.

37574 - Update Report Logo

Update the "Maximizer Enterprise" logo on existing reports with "Maximizer CRM". This applies to reports accessed by the Reporter module, Dashboards, and reports located under the Reports > Crystal Reports menu.

38598 - Update the Other Products Lists

Update the Other Products lists for each Maximizer CRM edition: Group, Standard, Professional, and Enterprise. This feature includes feature 39529 - Create Help > Other Products dialogs for Missing Products.

38597 - Update the More Information URL

Update the More Information URL for each product listed under Help > Other Products.

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37072 - Display User's Icon in the Daily Calendar Report

Support displaying the user's icon in the Daily Calendar report. Also, prompt user if they would like to include calendar legend with the report. Note that the time interval printed in the report is always 30 minutes, regardless of the value that the user has selected in Preferences.

32292 - Reduce Start up Time

Optimizations have been made to reduce the start up time for Maximizer CRM.

19120 - MTI Import Optimization

Maximizer Transfer Interface (MTI) optimizations have been made that reduces the time to import MTI files that have Note text.

32835 - Sort Order for Different Languages

To support the correct sorting of non-English character sets within Maximizer, a file named CustomSortTable.txt may be created with the desired sort order and saved to the Maximizer/MaData6 folder. Upon start, Maximizer reads this file and sorts information accordingly. Two example customer sort order files are installed with Maximizer, CustomerSortTable_Russian.txt and CustomSortTable_Ukrainian.txt.

32938 - Convert the F1 WinHelp files to HTML

The Help files for Maximizer CRM and Administrator have been converted to HTML.

34905 - Define Character Set for Email Service

The administrator user can set the default character set to be used by the email service (Automated Campaigns and Email Notifications).

40153 - Provide Expert Advice from Maximizer

Create a custom Maximizer Toolbar button and menu under Tools named 'Expert Advice'. When either the button or menu is selected open a browser window and display Expert Advice from CanDoGo™.

35570 - Icon Bar Elements Visibility

Icon bar elements will be visible or hidden based on the user's security setting. Sales tab will be hidden when user does not have read rights to Opportunity. Marketing tab will be hidden when user does not have read rights to Campaigns. Service tab will be hidden when user does not have read rights to Customer Service and Knowledge Base.

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11.0 Integration

36339 - Accounting Link for Microsoft Dynamics GP

The new Accounting Link for Microsoft Dynamics GP supports Microsoft Dynamics GP 9.0. This feature includes features: 36337 - Create Following Window - Support linking of Address Book Entries and Dynamics GP Accounts; 36304 - View/Update Transactions; 36338 - View Dynamics GP Customer Information; 36399 - Support Dynamics GP Invoice; 36300 - Add New Item; 36301 - Support Dynamics GP Quote; 36302 - Support Dynamics GP Purchase Order; 36334 - Shortcut menus for Accounting Window; 36305 - Create Invoice from Selected; 36303 - Create New Dynamics GP Transaction from Selected; 36333 - Create Microsoft Dynamics GP Customer/Vendor; 36335 - Control Windows Menu Commands (Edit); 36336 - Recording the Transaction as a Maximizer Note; 36340 - Configuration - Security & Licensing; 37728 - Configuration - Accounting Setup; 36332 - Product Name and Labeling.

33882 - Support for Microsoft SQL Server Reporting Services (SSRS)

Support for Microsoft SQL Server Reporting Services has been added. An option has been added to the System Options tab of the preferences dialog to allow Administrators to specify a valid Reporting Services URL. When a valid SQL Server Reporting Services location is specified a new menu named "SQL Server Reporting Services" appears under the Reports menu. Like the Crystal Reports menu, the SQL Server Reporting Services menu will be dynamically generated based on the reports and folders available on the specified SSRS. The menu also includes a "Refresh" option at the bottom, which refreshes the menu. Note: there is no "Personal" folder as this feature supports server side reporting only.

37930 - Install SQL Server Reporting Services Sample Reports

Add an option to the Maximizer CRM Server installer (Professional and Enterprise Editions) to include Microsoft SQL Server Reporting Services sample reports. When selected, the SSRS reports are copied to the %SystemRoot%\Program Files\Maximizer\Reports\SSRS Samples folder. The sample reports must be deployed manually to SQL Server Reporting Services.

34414 - Outlook Integration - Maximizer Record Creation Confirmation Dialogs

When saving a contact (Save Contact to Maximizer) or email (Save Sender as Contact to Maximizer) from Outlook to Maximizer prompt the user for information on how to create the Address Book entry in Maximizer. Confirmation options are Company, Individual, or Contact for an existing Company/Individual. In the case of Contact for an existing Company/Individual, user is provided option to search for desired Address Book entry.

33928 - Maximizer CRM Gadgets

Two gadgets have been created: Address Book Gadget, Sales Dashboard Gadget. Sales Dashboard Gadget and Address Book Gadget require Maximizer CRM on Windows Vista Operating System.

35140 - New Phone Mapping for MOCI / MECI Synchronization

Support new phone mapping algorithm when synchronizing between for Maximizer and Outlook (MOCI) and Maximizer and Microsoft Exchange Server (MECI).

35082 - Multi-Contact Appointments - MaxAlarm

MaxAlarm has been updated to support Multi-Contact Appointments.

35089 - Outlook Synchronization Updated to Support Multi-Contact Appointments

Outlook Synchronization has been updated to support the new fields for the multi-contact appointment.

33817 - Outlook Integration - Support Windows Authentication Mode for SQL Server

Support Windows Authentication mode. Users should not have to supply login info if mapped to a Windows domain user. Note Windows Authentication or Single Sign On is not supported in Group Edition.

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12.0 MaxExchange Synchronization

12.1 MaxExchange Synchronization Server

32314 - Synchronization of Multiple Databases with Same SPDM/Site Manager

MaxExchange supports synchronization of multiple databases with same SPDM/Site Manager.

33660 - Support Windows Authentication Mode for SQL Server

Support Windows Authentication for SQL Login. Note Windows Authentication or Single Sign On is not supported in Group Edition.

36974 - Support Multi-Contact Appointments for All Address Book Entries at Remote

Support Multi-Contact appointment; all multi-contact appointment records should synchronize to remotes when one or more of the related Address Book entries exists at the remote. Any attendees that are not synchronized to the remote should be denoted by 'N/A' in the appointment dialog at that site.

35050 - Support Synchronization of New Appointment Fields

Support Synchronization of the new Appointment fields: Appointment Address Book entries, Activities fields. This feature includes: 35049 - Support Synchronization of Appointment's Products/Services and Categories Fields.

33635 - Support the Synchronization of the New Document Category Field

Support the Synchronization of the new document category field (26154 - Document Category Field). This feature is related to feature 35181 (Create a Document Category Field: MaxMobile) which supports the synchronization of Document Category Field transactions for MaxMobile.

37481 - Support Synchronization of Custom Fields

Support synchronization of Custom Fields feature (32201). Support Add, modify, and delete transactions.

38310 - Support Distribute Interface Customizations to Remote and Remote Server

The Distribute Interface Customizations to Remote and Remote Server option has been added to the MaxExchange Site Manager Server Settings screen. This option allows the MaxExchange Administrator to control if Custom Field Labels (32201) are to be synchronized to MaxExchange Remote Server(s) and Remote Workstation(s).

16181 - Add "Address Book Verification" to MaxExchange Server Manager's File Menu

The Address Book Verification feature has been added to MaxExchange Server Manager File menu.

35822 - MaxExchange data Encryption

Implement encryption for SQL based MaxExchange data packets.

37973 - MaxExchange to Support Maximizer Product Catalog Transactions

Support the synchronization of Maximizer Product Catalog. This feature is related to 36345 - Support Adding and Editing Catalog Project from the OrderDesk window.

38978 - MaxExchange Server Optimizations

Optimizations for MaxExchange Server and MaxExchange Remote have been made; Packet processing duration has been reduced by creating outbound packets directly, by passing the step of writing the data to a table and then exporting. Memory usage has been optimized by freeing allocated memory as soon as its purpose as been accomplished.

35061 - Support Transactions Created by Global Remove from Within the Global Edit Dialogs

MaxExchange supports transactions created while perform a global remove. This feature is related to feature 34554.

16747 - Press Refresh Button for Site Clears Outbox for that Site

Support clearing all OUTBOX folders on Refresh when Site Manager on same machine as MaxExchange Server.

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10933 - Support Double-clicking on the Shortcut to Open the MaxExchange Server Manager

When the MaxExchange Server Manager is running and its icon is minimized in the system tray, restore the MaxExchange Server Manager when the user double clicks on the desktop shortcut.

16069 - Add Message to Configure Server Settings

If the Server transportation method (FTP, Email, and Network Direct) is not set and a user launches Server Manager, pop up a message box informing the user that they need to configure their server settings. Implement for Server/Remote Server.

36171 - Upgrades Write New Address Book Information to Shared Folder

During a Pervasive database upgrade a file will be created in the database folder with information about new Address Book location. File name is DbTrackInfo.txt.

35177 - Transactions for Setup Security Groups and Teams

Support transaction created by the setup of security groups and teams from the Maximizer Web Access Administrator. This feature is related to 33160 - Setup Security Groups and Teams.

39597 - Support Products/Services and Category Transactions

This feature ensures transactions are created for Products/Services and Category changes via Administrator and that those changes are synchronized.

12.2 MaxExchange Remote

34874 - Remote to Send Acknowledgement Packet to MaxExchange Server when there are no Changes

When a Remote synchronizes with the MaxExchange Server, if the remote has no change an acknowledge packet will be created by the remote. This behavior is advantageous as it allows the backup files for the site to be cleared and avoids messages claiming that the site has not processed.

36040 - Support Create New Address Book Option on Initial Refresh

When the MaxExchange Remote receives the initial refresh, prompt the user to select an existing Address Book or to create a new Address Book. If the user chooses to create a new Address Book, the Address Book is created locally.

17346 - Support Packet Number on Subject Line for Email Transport

Support packet number on subject line of email for MaxExchange Server and MaxExchange Remote.

33825 - Support Part Number to Subject Line of Email Packet for Split Packets

When a MaxExchange packet is split, include the part number (along with the Packet Number - 17346) in the email subject line.

35042 - Change MaxExchange REM File from Pervasive Format

The first time MaxExchange remote is launched after Address Book upgrade MXZREM.MAX (Pervasive) is converted to MXZREM.BIN file. This feature is related to 36171.

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13.0 Appendix – Full Feature List

Note: Features not described in this document but included in the product are indicated with an *.

Address Book

- 17171 - Group Users - Multi-Contact Appointment Dialog
- 33541 - Show Tooltip when Mouse-Over the User Drop-down List
- 34546 - Support Two Level Security on Favorite Lists
- 34547 - Support Two Level Security on Search Catalogs
- 34548 - Support Two Level Security on Column Setups
- 34558 - Products/Services and Categories fields Added to the Appointment dialog
- 34588 - New Calendar View; Weekly List View
- 34717 - Support Products/Services and Categories Fields to the Opportunity/Customer Service Case/Appointment dialogs
- 35029 - User Can Create or Connect to a New Address Book
- 35040 - Store vertical packs in SQL
- 35074 - Support Multi-Contact Appointments
- 35075 - Multi-Contact Appointment - Appointments related dialogs
- 35076 - Multi-Contact Appointment - Action Plan dialog
- 35077 - Multi-Contact Appointment - Text Field
- 35233 - Delete Recurring Appointment
- 36433 - Appointment Details Reports
- 38830 - Support SKU/Reference Number field in Add/Modify Catalog Item Dialog Box
- 39317 - Support Document Administration
- 39529 - Create Help -> Other Products Dialogs for Products
- 39644 - New Reports

Administration

- 09820 - Modify System Tables
 - 16168 - Allow the User to Turn Off the Tabs in the Icon Bar
 - 16485 - New User Role: Administrator
 - 23924 - Database Validation: Correct MaxExchange UDF assigned to Contacts Case Scenario
 - 34560 - Group Users - Multi-Contact Appointment Dialog
 - 34576 - Allow Transfer, Allow Import, and Allow Export
 - 35039 - Simplify the Create a New Address Book Wizard
 - 35092 - Support Products/Services and Categories relationships
 - 35574 - Support Accounting and Mobile Columns in Users Dialog
 - 38249 - Update Labels, Captions and Graphics to Maximizer CRM
 - 38250 - Update Labels, captions and graphics to Maximizer CRM (Thin)
- ### Architectural
- 09809 - Support Windows Authentication Mode for SQL Server
 - 23578 - Database/User creation creates default records of all types
 - 35034 - Changing Password - Group Edition Only
 - 35043 - Installation to Embed MS SQL Server Express
 - 37107 - Install .NET Framework 3.0
 - 37574 - Update Report Logo
 - 38235 - Reporter Module Available in Maximizer CRM Professional and Enterprise Edition Only (Desktop)
 - 38236 - KnowledgeBase Module Available in Maximizer CRM Enterprise Edition Only (Desktop)
 - 38239 - KnowledgeBase Module Available in Maximizer CRM Enterprise Edition Only (Thin)
 - 38240 - Reporter Module Available in Maximizer CRM Professional and Enterprise Edition Only (Thin)
 - 38243 - Create Installation for Three Editions of the Maximizer CRM
 - 38251 - Update Installation Wizards with New Product Name
 - 38254 - Fax/Print Campaigns Available in Enterprise Edition Only (Desktop)
 - 38260 - Windows Authentication and Single Sign On is not supported by Maximizer CRM Group Edition (Desktop)
 - 38300 - Windows Authentication and Single Sign On is not supported by Maximizer CRM Group Edition (Thin)

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38597 - Update the More Information URL
 38598 - Update the Other Products Lists
 38612 - Support Upgrade Address Book - Convert Documents Utility
 38615 - Maximizer CRM DB Sizing Estimation
 38616 - Perform Address Book Size Check at Start-up (SQL Server Express Only)
 38617 - Perform Address Book Size Check at Start-up (Maximizer Web Access)
 38892 - Change MaxMobile CRM to MaxMobile (Installation)
 38898 - Support Option to Disable the SQL Express Address Book Size Check on Login
 38899 - Support Option to Disable the SQL Express Address Book Size Check on Login (Maximizer Web Access)
 39264 - Change Product Name from MaxMobile CRM to MaxMobile
 39265 - Change Product Name from MaxMobile CRM to MaxMobile (BlackBerry)
 39328 - Change Product Names for Portals in Maximizer CRM
 39405 - Maximizer Web Access to Respect Trial
 39450 - Group Edition does not support SQL Analytics or Reporting Services
 39529 - Create Help -> Other Products dialogs for Missing Products
 39566 - Update Properties Dialog Box Labels

Customization

33201 - Custom Field Labels
 33279 - OLE Automation: Additional Searches
 33562 - User Object Enhancements (Maximizer data)
 33563 - ReadUserView Implementation with Static Column Setup
 33667 - OLE Automation: Document Functions Updated with New Category Field
 34245 - Support Import of Custom Field Labels
 34705 - New OLE Automation Hook: AppButtonHook
 33713 - Maximizer Web Services
 34709 - Support New AppButtonHook
 35080 - Support Multi-Contact Appointments
 35087 - Multi-Contact Appointment
 35099 - Support Products/Services and Categories
 36076 - Document Label Binding Methods and Include Sample Code
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 39790 - Customization Suite Installation changes for Maximizer CRM 10

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33817 - Outlook Integration - Support Windows Authentication Mode for SQL Server
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 35082 - Multi-Contact Appointments - MaxAlarm
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 35140 - New Phone Mapping for MOCI / MECI Synchronization
 36299 - Support Dynamics GP Invoice
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 36303 - Create New Dynamics GP Transaction from Selected
 36304 - View/Update Transaction
 36305 - Create Invoice from Selected
 36332 - Product Name and Labeling
 36333 - Create Microsoft Dynamics GP Customer/Vendor
 36334 - Shortcut menus for Accounting Window
 36335 - Control Windows Menu Commands (Edit)
 36336 - Recording the Transaction as a Maximizer Note
 36337 - Create Following Window - Support linking of Address Book Entries and Dynamics GP Accounts

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36338 - View Dynamics GP Customer Information
 36339 - Accounting Link for Microsoft Dynamics GP
 36340 - Configuration - Security & Licensing
 37728 - Configuration - Accounting Setup
 37930 - Install SQL Server Reporting Services Sample Reports
 39148 - Support Creating Sales Quotes Items Table Merge Field
 39337 - Default Item Table Merge Field & Sales Quote Template Microsoft Word

Marketing

11184 - Show Opportunity revenue (In Progress and Won) for specific Campaign(s)
 22873 - Add Maximizer Word Process Template Support for Microsoft Fax
 32143 - Direct Insert option Added to Web Inquiry Form Wizard

MaxExchange Synchronization

10933 - Support Double-clicking on the Shortcut to Open the MaxExchange Server Manager
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34884 - Create MaxMobile Application for BlackBerry Devices
 34886 - Implement Address Book window
 34887 - Add/ Delete Address Book entries
 34888 - View / Modify Address Book entries
 34892 - Implement Opportunities Window
 34893 - Support Adding and Deleting Opportunities
 34894 - View/Modify Opportunities
 34896 - Support Alarm for Appointments and Hotlist Tasks
 34897 - Support Customer Service
 34898 - Add/Delete Customer Service Cases
 34899 - View/Modify Customer Service Cases
 34889 - Implement Hotlist Window
 34890 - Add/Modify/Delete Hotlist Tasks
 35066 - Implement Appointment Dialog
 35096 - Support Products/Services and Categories - Database changes
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 36310 - USB Sync - Sync Address Book entries

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36312 - USB Sync - Sync Customer Service Cases
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 36314 - USB Sync - Sync Appointments
 36315 - USB Sync - Sync UDFs
 36316 - USB Sync - Sync Notes
 36321 - Wireless Sync - Sync Address Book entries
 36322 - Wireless Sync - Sync Opportunities
 36323 - Wireless Sync - Sync Customer Service Cases
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 36326 - Wireless Sync - Sync UDFs
 36326 - Support Activities in Address Book Entry, Opportunity, and Customer Service Case Dialogs
 36836 - Wireless Sync Handle Dropped Connection
 36837 - Scheduled Sync for MaxMobile based Schedule Set on Device
 37867 - Support Carrier Specific Parameters for Wireless Synchronization
 39265 - Change Product Name from MaxMobile CRM to MaxMobile (BlackBerry)
 39297 - Support Web Service Compression
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33883 - Wireless Sync for MaxMobile - Wireless Synchronization
 34235 - Wireless Sync for MaxMobile - Synchronization Settings
 34280 - Support Category in the Documents tab - GUI for PPC
 34281 - Support Category in the Documents panel - GUI for Smartphone
 34358 - MaxMobile - Install New .NET Framework Compact 2.0 SP1
 35007 - Wireless Synchronization for MaxMobile (GUI for PPC)
 35085 - Multi-Contact Appointment - GUI for PPC
 35093 - Products/Services and Categories - MaxMobile
 35258 - Add Multi-user Licensing To MaxMobile
 36263 - Cradle Synch - Check "MaxMobile" Module Login Value
 36591 - Cradle Synchronization to Support New Appointment Dialog Fields
 36592 - Multi-Contact Appointment - GUI for Smartphone
 37573 - Create MaxMobile Settings Interface to Support MaxMobile only Deployment
 38002 - Support Multi-Contact Appointment fields in Activities, Hotlist, and Calendar (PPC)
 38003 - Support Multi-Contact Appointment fields in Activities and Calendar (Smartphone)
 38272 - Create UIS Synchronization Server Installer for MaxMobile Wireless Synchronization
 38354 - MaxMobile Wireless Synchronization - Support Web Service Compression

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 32288 - HTML Spellchecker
 32292 - Reduce Start up Time
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 32835 - Sort Order for Different Languages
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37072 - Display User's Icon in the Daily Calendar Report
 37425 - Increase Auto-Signature Character Limit to 5000 Characters
 38604 - Add New Basic Fields to the Hotlist Column Setup
 40153 - Provide Expert Advice from Maximizer

Sales

08642 - Territory Management
 25825 - Dashboard Interface Improvements
 27261 - Add Dashboard section for My Work Day
 32199 - Support Sales Quotes
 33322 - Dashboard: Support Horizontal Scroll Bar in Properties Dialog
 36345 - Support Adding and Editing Catalog Project from the OrderDesk window
 37731 - Update Easona Tutorial with New Data
 38076 - Support Creating Sales Quotes Items Table Merge Field
 38252 - Territory Management available in the Enterprise Edition only
 39334 - Support UI to Specify Catalog Project Location for OrderDesk
 39403 - Territory Management Report
 39635 - Sales Quote Expiry Date Approaching Report
 40155 - Rename Edit menu item from Catalog and Items to Product Catalog

Sites

26032 - Territory Management (configuration)
 26034 - New control for user selection*
 32079 - Support Email Window in Maximizer Web Access
 32220 - Support Hotlist Task and Appointment Alarms in Maximizer Web Access
 32274 - Use ASP.NET 2.0 Tree Control
 32298 - Dialog Load Time Improvements (caching option lists)
 32574 - General Performance Improvement in the Portals and Middle Layer
 33111 - Login Page: Default Address Book
 33143 - Database Management
 33145 - Setup UDFs
 33149 - System Fields
 33150 - Locations and Resources
 33151 - Address Book Category
 33153 - Opportunities
 33154 - Preferences - Customer Service
 33156 - Administrator - Key Fields tab
 33159 - Setup Users
 33160 - Setup Security Groups and Teams
 33657 - Customer Service Monitoring
 33661 - All Portals - Support Windows Authentication Mode for SQL Server
 33868 - Allow User to Turn Off the Tabs in the Icon Bar
 33869 - Ability to Set UDF Folders, Items, and Fields as Active/Inactive
 34682 - New Calendar View: Weekly List View
 34687 - Support Two Level Security on Favorite List
 34689 - Support Two Level Security on Search Catalogs
 34691 - Support Two Level Security on Column Setups
 34716 - Support Show Disabled Users option
 34719 - Support Users and Groups in Multi-Contact Appointment
 34845 - Support Create New / Employ Existing Address Book
 34882 - Territory Management (Search and Alignment Conditions)
 35056 - Enforce User/Group Setup Rights & GUI Improvements
 35066 - Custom Field Labels (including Import GUI)
 35070 - User Preferences - Personal Settings Only
 35123 - Support Setup UDF via Maximizer Web Access
 35205 - Optimize Various Screens/Functions
 35567 - Ask at Start up Which Address Book List to View
 35921 - Email Windows Support - Send Email dialog

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35089 - Multi-Contact Appointments - Calendar
36105 - Support Move to Folder in Email Screen
36118 - Support To, CC, and Bcc in the Send Email dialog
36121 - Support Spell Checking in Maximizer Web Access Email
36138 - Support View Menu and View Bar for Email Window
36152 - Support Email Merge - Maximizer Web Access Compose Email Dialog
36478 - Support Categories Items as Sub-items to Products/Services Items
38233 - Territory Management available in the Enterprise Edition only
38246 - Support SMTP and IMAP user IDs and passwords fields
38547 - Support Administrator Preference to Set IMAP and SMTP servers
38917 - Support HTML, Merge Field, and Other Features in Existing Compose Email Dialog
39218 - Support Search For User

Wireless Access

33634 - Document Category Field, Wireless Access
34551 - Allow the customization of the Search Results Screen
34553 - Add the Contact's Email Address and Telephone Number to Appointment Screen
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34718 - Support Multi-Contact Appointments
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36025 - Products/Services and Categories - Add Fields to Opportunity Screen
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