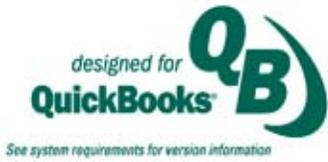# Accounting Link Designed for use with QuickBooks®

Sell Faster. Improve Customer Service.

Capitalize on the wealth of information stored in your QuickBooks® accounting system. Increase the productivity of your sales and customer service staff by giving them access to this critical financial data through Maximizer Enterprise™[1]. Integrate with QuickBooks to reduce redundancies and inconsistencies. Then let your frontline staff use the familiar Maximizer Enterprise interface to quickly respond to customers' questions and enter new orders—without having to verify credit limits or inventory levels with accounting.

Maximizer Enterprise Accounting Link for QuickBooks helps your frontline staff access all the information they need to effectively service accounts and build successful, profitable customer relationships. Maximizer Enterprise supports QuickBooks Pro, Premier and Enterprise for the US, Canadian, UK and Australian versions.[2]

Deliver accurate estimates, close deals faster

- Provide customers with accurate, timely estimates by retrieving up-to-date prices and inventory levels from QuickBooks.
- View the status of a customer's unpaid invoices, including outstanding items from previous billing periods, before quoting on a new order.
- Save time creating QuickBooks estimates and invoices by working from one screen in a customer's Maximizer Enterprise record.
- Automatically save a complete history of transactions to the customer's record for future reference.
- View and create purchase orders for your suppliers from within Maximizer Enterprise.

Service customers efficiently and effectively

- Give your frontline staff immediate access to customers' financial information so they can answer questions faster. Let them look up a customer's credit limit and balance details—without having to contact the accounting department or install another application.
- See a complete customer history of estimates, invoices, credit limits and balances with one click. Easily access all QuickBooks-related information from the accounting tab in the customer's Maximizer Enterprise record.

QuickBooks Estimates and Invoices: Generate accurate, timely estimates and invoices from within Maximizer Enterprise.

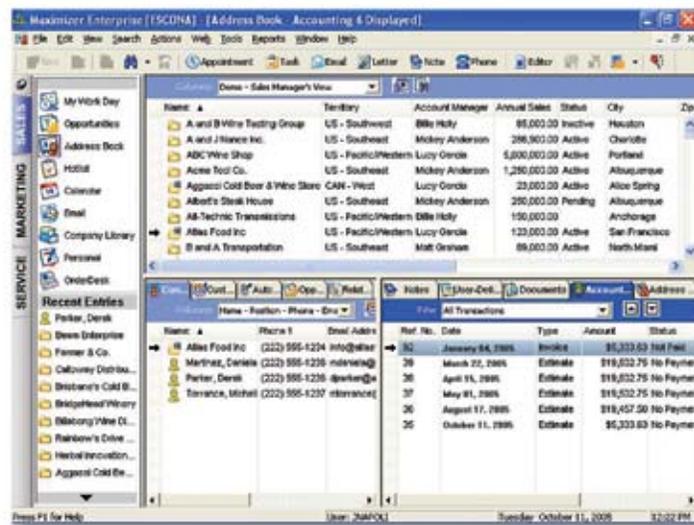## Monitor critical business activities and respond to opportunities

- Respond to critical business activities and follow up on every opportunity. Save time by monitoring data in QuickBooks and Maximizer Enterprise with Workflow Automation.

    Examples:

    ✓ Configure your system to send an email to the appropriate account manager when a customer with a pending sale is put on credit hold.

    ✓ Automatically send a "Thank you" email to a customer when their order ships.

    ✓ Monitor QuickBooks for stock surpluses, then move the extra inventory by easily notifying resellers of special discount or reward programs.

Deploy and link quickly

- Set up and link Maximizer Enterprise to your QuickBooks database quickly. One click matches customer and vendor records between the two applications.

- Let users who don't have QuickBooks installed on their computers view customers' financial information through the QuickBooks tab in Maximizer Enterprise.

- Maintain the accuracy and quality of your data by setting up security rights for individual users that allow them to either view or edit data.

- Show information at-a-glance by linking QuickBooks fields with Maximizer Enterprise custom fields using the Advanced Customization Suite.

QuickBooks Tab: Click once for a complete customer history.

---

[1] Accounting Link is an add-on to Maximizer Enterprise. Additional license fees apply.
[2] See www.maximizer.com/support/products.html for a current list of the supported versions of QuickBooks.

9 Reasons that Make Maximizer Enterprise Better

- Award-winning, intuitive, integrated sales, marketing, customer service & support CRM software
- Adaptable to your business demands
- On demand access: Desktop, PDA & Web-Ready
- Rapid deployment & results
- Works with Office, Outlook®, and accounting programs
- Bullet-proof security
- Architecture built on industry standards
- Affordable: Lowest total cost of ownership in its class
- Proven with over 7,500 customers and over 10 years focused on customer managment software

Maximizer Enterprise 9.5

Designed for small and medium-sized businesses, Maximizer Enterprise 9.5 rapidly helps companies gain strategic insights and implement winning strategies that will outperform competitors. This proven, affordable CRM solution gives sales, marketing and service professionals the tools they need to attract prospects, win new customers and increase repeat business.

About Maximizer Software

Maximizer Software has helped over 7,500 Maximizer Enterprise customers and more than one million Maximizer users grow their businesses by building profitable customer relationships with award-winning solutions.

For more on Maximizer Enterprise 9.5, go to www.maximizer.com for access to:

- More product details
- Online demonstrations
- Live webinars
- CRM best practices white papers
- 30-day trial software
- Pre-recorded webcasts
- System requirements

Maximizer Enterprise works with technology from the following partners

Microsoft GOLD CERTIFIED Partner   Business Objects   BlackBerry Alliance Member   designed for QuickBooks   PERVASIVE Unleashing the value of data™   Vineyardsoft

Awards

2006 SIIA //CODiE// FINALIST   Business MIDMARKET PRODUCTS OF THE YEAR   THE 2005 CRM LEADER AWARDS   CRM Excellence TMC 2005   ism TOP 15 2006 www.ismguide.com

Certified Solution Provider

For More Information

Contact Maximizer Software
1-800-804-6299

sales@maximizer.com

Locate a Certified Solution Provider
1-800-624-4153

Americas
604-601-8000 phone
604-601-8001 fax
info@maximizer.com
www.maximizer.com

Asia
+(852) 2598 2888 phone
+(852) 2598 2000 fax
info@maximizer.com.hk
www.maximizer.com.hk

Australia/New Zealand
+61 (0) 2 9957 2011 phone
+61 (0) 2 9957 2711 fax
info@maximizer.com.au
www.maximizer.com.au

Europe, Middle East & Africa
+44 (0) 1628 587777 phone
+44 (0) 1628 587778 fax
info@max.co.uk
www.max.co.uk

Maximizer™
The CRM Company www.maximizer.com

Maximizer Enterprise 9 — Simply Successful CRM v 9.5