Maximizer™ CRM 10

For IT Executives

Key Benefits

- Implement quickly with unprecedented easy configuration

- Offer anywhere access while protecting valuable data on in-house servers

- Manage security and permissions for users and groups

- Customize and automate processes to match your industry and business

- Leverage industry standards and Microsoft platform technologies

"For us, it was critical that our transition from Salesforce.com to Maximizer Enterprise went very smoothly and ultimately that our employees were comfortable with and used the system. With limited IT resources in house, we brought in a team from Maximizer and their local consulting partner iCRM to install the software, do the conversion from Salesforce.com and tie the system to our Macola ERP program. This was a good decision—we've benefited from their expertise."

Ed Scott, IT Manager
TigerStop LLC

Low-maintenance, adaptable CRM for rapid impact, less cost

Deliver mission-critical CRM and free resources with Maximizer CRM 10. For small and medium-sized businesses, Maximizer CRM offers functionality on a platform that generates results with minimal time, budget and effort. Compatible with existing back-end technologies, Maximizer CRM is easy to configure, administer, customize and maintain. And with unprecedented low total cost of ownership, this truly adaptable solution fits your business without blowing your IT budget.

Deploy fully featured CRM in weeks, not months

Save time and money by implementing Maximizer CRM on your existing technology framework, avoiding expensive, complex back-end installations. Eliminate complex integrations between front-office applications and data sources with a single CRM interface optimized to run on standard technologies including the latest Microsoft® Windows Vista, Windows Mobile,.NET, and SQL Server.

- Deploy quickly with support for Microsoft® Systems Management Server (SMS), and maintain easily with administrator-controlled Live Update to distribute latest releases.
- Give remote and mobile staff fast, reliable access to critical information via handheld devices (BlackBerry®, Windows Mobile®, or Palm®), with remote synchronization (MaxExchange), or through online Web Access.
- Instantly use with Microsoft® Office®, Outlook® and Exchange[i], plus Lotus Notes® and GroupWise.
- Integrate out-of-the-box with Microsoft Dynamics™ GP (formerly Great Plains) or Intuit® QuickBooks® to enable 360° views of your customer[ii].
- Give management visibility with out-of–the box reports and dashboards.

Administration that is flexible, on-the-fly

Create new databases based on preset configurations and template industries (High-Tech, Real Estate, Financial Services and Legal) that come with pre-built fields, views, searches, action plans and documents. Administer from anywhere to configure new fields and set-up security and permission levels.

- Easily configure custom fields—and immediately make them available for use, searching and viewing.
- Create unique data entry forms, giving each department the flexibility they need without any programming.
- Set pre-populated opportunity and case creation windows to help staff enter information faster and reduce data-entry errors.
- Ensure completeness of information with mandatory fields; accuracy of data with duplicate record checking, deletion protection and archiving; and integrity of data with automatic audit logging to retain important changes in a record.
- Import data in standard formats such as XML, CSV, dBase, or other customer management systems such as ACT! or GoldMine.
- Enable secondary administrators for temporary or regional administration.

Maximizer Software
Simply Successful **CRM**

Security measures help safeguard sensitive information

Secure critical customer data in-house, protecting information amongst staff, while providing open access via client, web or mobile device.
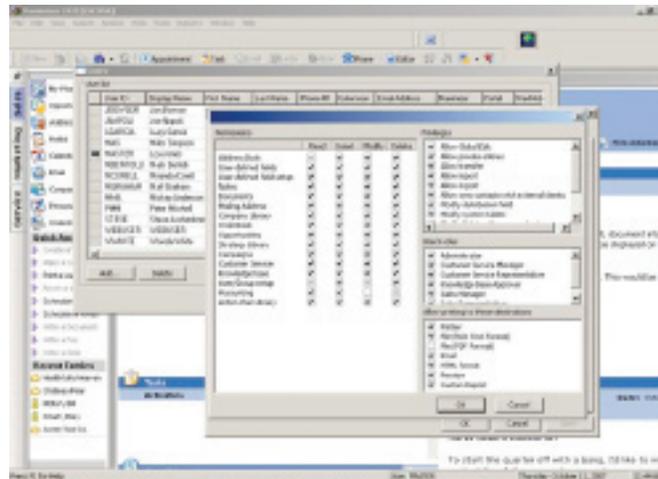

Security and permissions: Control staff members' rights to read, view, create, or delete information.

- Enable employees, partners, and customers with Web Access built on the Microsoft .NET framework for user authentication, secure database access, session management, and system logging.
- Quickly set up role and group-based security and permission to determine which staff see which records, fields, lists and have rights such as creating, deleting, and adding notes, documents, and other critical information.
- Secure data with industry-standard 128-bit encryption, and protect sensitive data with role-based security at the database level.
- Tightly control individual security rights—including importing/exporting, transferring and administration.

Give management visibility with reports and dashboards

With pre-configured reports and dashboards, powered by Crystal Reports and Microsoft SQL Reporting Services, give management the power of knowledge—now.
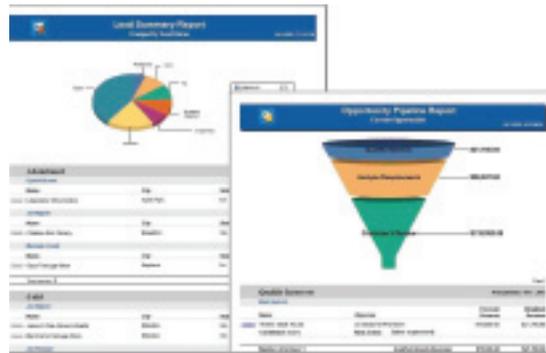
Create business visibility: Leverage out-of-the-box reports or customize your own to deliver the insight executives need to effectively manage the business.

- Leverage more than 175 our-of-the-box reports, including templates in industry standard Crystal and Microsoft SRS; then customize with Crystal or Radius 90.[iii]
- Give executives a dashboard of critical performance metrics to check the real-time status and health of the business every day.
- Empower managers and executives with on-the-fly reporting to quickly and easily answer their important business questions.
- Enable staff to export reports to Excel for easy analysis in a familiar environment.
- Automatically provide reports to key stakeholders on a timely basis[iv]
- Pull data from other database applications (accounting or ERP) to run reports against customer data for a complete view of buying patterns and habits.[v]

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Maximizer CRM 10 Features

- Account and contact management
- Time management
- Task management and automation
- Sales force automation
- Sales forecasting
- Marketing automation
- Email marketing
- Customer service management
- Microsoft Office integration
- Outlook & Exchange synchronization
- Accounting integration
- Business Intelligence
- Workflow automation
- Partner relationship management
- eBusiness
- Access options: Windows desktop, web, mobile devices, remote synchronization

Technology Partners

Microsoft GOLD CERTIFIED Partner

Business Objects

QuickBooks QB

Vineyardsoft

BlackBerry Alliance Member

CanDoGo Know How Now!

goldmine

Certified Solution Provider

Automate sales, marketing & service with minimal IT drain

Build in your unique business processes faster with pre-configured fields, built-in workflow and document templates, action plans and macros.

- Monitor critical activities and send automatic to-do alerts with Workflow Automation powered by KnowledgeSync[vi]. Consolidate actionable data from a variety of sources for users to save time and ensure no opportunity slips through the cracks.
- Monitor data based on business context and rules to identify milestone events in the customer lifecycle. Set these events to trigger an automatic response—such as an email or phone alert, a Crystal Report, or database update. For example:
  - Alert sales reps to new leads, triggering a series of automated response emails.
  - Update your marketing manager with regular lead summaries.
  - Notify your sales manager when more than five opportunities are abandoned by a sales rep
  - Warn your support team when a case resolution is delayed for more than a few days.

CRM designed to fit your business

Build the CRM workspace to mirror your unique business processes and strengths—rather than asking users to change how they work in order to accommodate the constraints of a technology platform.

- Maximizer Web Service allows the easier exchange of information with Maximizer CRM over HTTP for standardized, faster integration with other web services ready applications.
- With the meta data layer, and interface customization utility, easily create alternate captions for field labels on dialogs, windows and menus to customize the interface to your industry.
- Use direct, native SQL updates for industry-standard coding and customization.
- In addition to out-of-the-box Accounting Link for QuickBooks and Dynamics GP, use the Accounting API to connect to other applications.
- Create extensions and integrate Maximizer CRM with other applications, using the powerful Customization Suite, featuring an integrator's toolkit that supports .NET, XML, COM, ODBC, OLE, ActiveX and DDE, and familiar languages such as Visual Basic® , Visual Basic.NET, C++® , and Access.
- Create custom windows and tabs for Windows desktop and web users. Even customize customer and partner Web Access to reflect your processes and business model.

Why Maximizer CRM 10

1. **Simple** and quick to deploy, learn, use and maintain.

2. **Access** to critical information through the web, Windows desktop, and mobile devices.

3. **Best value** in its class for full-featured CRM.

Visit www.maximizer.com for:

- Information based on your role: sales, marketing, service, executive, IT
- Information on features and technology
- Online demonstrations, trial software
- White papers on CRM best practices
- Webinars

Maximizer CRM helps small and medium-sized businesses maximize revenue, maximize satisfaction, and maximize every single day.

Call: 1-800-804-6299

Email: sales@maximizer.com

Web: www.maximizer.com

Americas	Europe, Middle East, Africa	Australia, New Zealand	Asia
604-601-8000 phone	+44 (0) 1628 587777 phone	+61 (0) 2 9957 2011 phone	+(852) 2598 2888 phone
604-601-8001 fax	+44 (0) 1628 587778 fax	+61 (0) 2 9957 2711 fax	+(852) 2598 2000 fax
info@maximizer.com	info@max.co.uk	info@maximizer.com.au	info@maximizer.com.hk
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