



# Microsoft® plus Maximizer for Seamless CRM

**Microsoft**  
GOLD CERTIFIED  
Partner

Works with:

- Office
- Outlook
- Exchange
- Windows Mobile
- Vista
- SQL
- Internet Explorer
- Virtual Earth
- Dynamics GP

*“Microsoft recognizes Maximizer Software as a Gold Certified Partner for demonstrating its ability to serve its customers and help drive their business success.”*

Lora Gernon, Director, Partner Sales Group  
Microsoft Canada

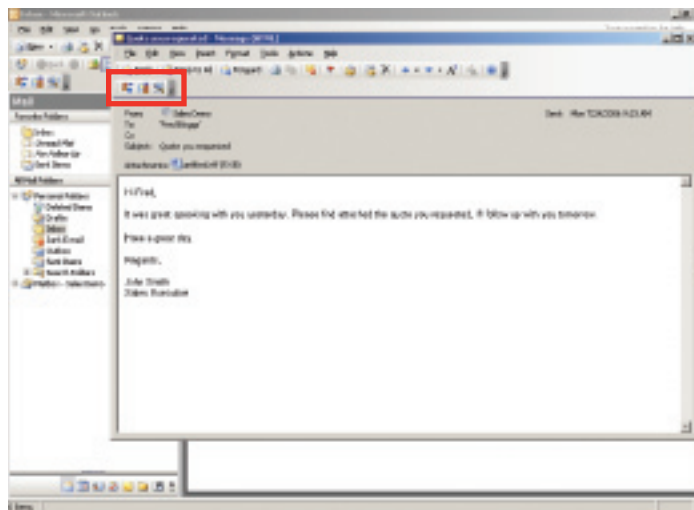
## Leverage the functionality of CRM on a Microsoft foundation

Small to medium-sized businesses with a Microsoft® technology foundation can leverage the strength of the familiar backbone and applications alongside the simple, accessible, adaptable Maximizer™ Customer Relationship Management (CRM) solution. Built for the Windows platform and leveraging the .NET framework and SQL database, Maximizer CRM opens the flow of information between a centralized CRM database and Microsoft applications such as Outlook®, Office and back-end programs such as Dynamics™ GP.

As a Microsoft Gold Certified Partner, we collaborate with Microsoft to stay on the leading edge, plus receive direct training and support that helps you better manage communications, increase productivity and collaborate seamlessly.

## Leverage Outlook as a CRM interface

When Outlook is transformed into a seamless CRM gateway, team members gain added insight in a familiar environment—and automatically contribute in-the-field insight back to the corporate community.



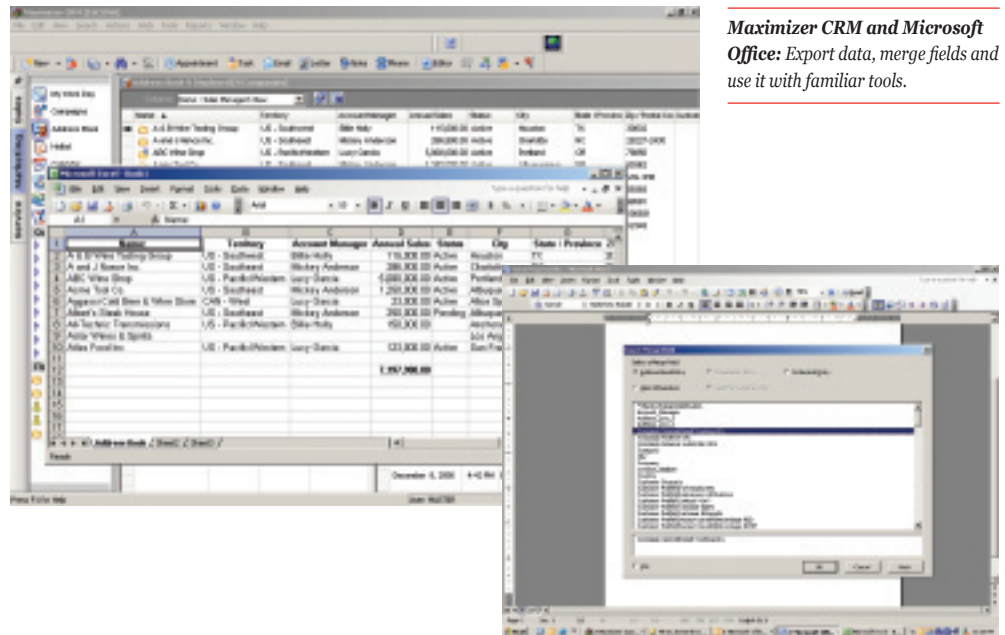
**Maximizer CRM and Outlook:**  
Use Outlook for email, and ensure that important communications are saved in customer records.

- Share critical communications company-wide while avoiding email overload. Give everyone access to relevant emails sent and received through Outlook by automatically saving them to customers' records—no cutting & pasting required.
- With one click, synchronize contacts to Outlook and vice-versa to Maximizer CRM to store a subset of customer records. Import contacts from Outlook to Maximizer CRM without reformatting or re-typing.
- View Outlook messages inside Maximizer CRM to go directly to that customer or prospect's record. Access both Maximizer & Outlook address books for the distribution of emails.

- With two-way synchronization of appointments and tasks, alert colleagues to scheduled meetings even in a mixed environment where some people work directly in the CRM space and others use only Outlook and Exchange.
- With Outlook synchronization, mobile workers can access contacts and appointments through handheld devices.

## Increase productivity with Office and Dynamics GP integration

Continue using the Office and accounting applications your team is familiar with and maximize productivity every single day.



*Maximizer CRM and Microsoft Office: Export data, merge fields and use it with familiar tools.*

- Personalize documents created in Word by inserting CRM-based data fields.
- Apply flexible layout and formatting with Word to rich text print and fax campaigns. Use FrontPage® for creating vibrant HTML email campaign content.
- Instantly export data and reports to Microsoft Excel, analyzing and sharing it within the familiar Microsoft interface.
- Save any Office document directly into customer records to preserve the evolution of proposals, quotes and other communications. Also store files in the central CRM document repository for staff to send to prospects and customers.
- Integration with Microsoft Dynamics GP, provided out-of-the-box with Accounting Link, provides a 360° customer view that pulls transactions, invoices, quotes, purchase orders directly into Maximizer CRM.



## Microsoft powers mobility and web access

With Internet Explorer and Windows Mobile®, collaborate with colleagues from anywhere.

- Access CRM data online through secure Web Access, built exclusively for Microsoft Internet Explorer on the .NET framework and enabled by Microsoft Internet Information Server (IIS). Log in from anywhere to perform regular tasks using just the web browser.
- For mobile staff, synchronize contacts and schedules to PDAs using MaxMobile for Windows Mobile Pocket PC and Smartphone devices, or use Pocket Internet Explorer to access Wireless Web Access online in real-time.
- Share information on leads, opportunities, and customer service cases with partners, wherever they are, with web-based Partner Access.

## Turn customer data into business intelligence

Backed by the power of the SQL database, Maximizer CRM enables fast deployment, integration, and reporting options through a robust, universal industry standard.

- Choose between SQL Server Express, the lightweight, embedded database with zero administration (with Maximizer CRM Group Edition) or SQL Server Standard for added security, and a foundation that supports more data and users (with Maximizer CRM Professional and Enterprise Editions).
- Rely on Microsoft's new SQL Reporting Services to help you turn your customer data into meaningful business information. Use the Radius 90 platform to create SQL SRS reports in an easy-to-use Office-like environment, then manage and deliver traditional and interactive reports quickly to decision makers.<sup>i</sup>

## Harness the power of Microsoft technology

Share information between applications—and connect stand-alone systems rapidly—with a CRM solution that is based on the .NET 3.0 framework and leverages the power of the Vista desktop.



**CRM Access from the Desktop:**  
With Vista gadgets, access contacts, leads, and your sales dashboard through one-click.

- With Vista Gadgets, access and search contacts and leads, and enjoy one-click access to the Sales Dashboard directly from the Windows Vista desktop.
- Leverage the Microsoft .NET framework for single sign-on, user authentication, secure database access, session management, and system logging.
- Deploy immediately with Systems Management Server (SMS) for fast installation.

<sup>i</sup> Radius 90 by 90 Degree Software is an add-on product with additional license fees available through Maximizer Software.

## 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



### Certified Solution Provider



- Customize easily with support for direct, native SQL updates—industry-standard coding for your IT staff. The Customization Suite, featuring the integrator's toolkit, also enables IT staff to use familiar programming languages such as Visual Basic®, Visual Basic .NET, C#, Visual C++®, and Access for extending the power of Maximizer CRM.
- Improve sales staff productivity with Microsoft Virtual Earth® integration, which delivers maps and directions to sales appointments.

### 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 Microsoft Dynamics GP and Maximizer CRM with Workflow Automation.

#### Examples:

- Automatically send a "Thank you" email to a customer when their order ships.
- Send an email to the account manager when a customer with a pending sale is put on credit hold.

### Deploy and link quickly

- Match and link Maximizer CRM customer records to your Microsoft Dynamics GP database with one click.
- Maintain accuracy and quality of your data by setting up security rights for individual users that allow them to view or edit transactions without creating new ones.
- Show information at-a-glance by linking Microsoft Dynamics GP fields with Maximizer CRM custom fields using the Customization Suite.

### Get Maximizer CRM today and get Simply Successful CRM.

#### 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](http://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.

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