

# All access options



## Access Maximizer CRM when and where you need it

### Optimise productivity and increase profitability

To work effectively and stay ahead of your competitors in today's demanding business environment requires a flexible and convenient CRM solution that delivers essential information and tools to suit where and how your staff work. Whether working in the office, from home, remote offices or on the road, Maximizer CRM All Access licencing provides a variety of options in one all-inclusive licence. All Access enables you and your team to work productively and effectively, to deliver the levels of sales, marketing and customer service required to build relationships that drive revenue.

Available through your Windows® Desktop, online via web access, or on your mobile smartphone or tablet, Maximizer CRM offers unparalleled access in one value-packed solution and brings critical information to you – wherever, whenever and however you do business.

### Windows® desktop for powerful and intuitive CRM

Maximizer CRM installed on your Windows desktop provides your customer-facing staff in the office with the critical information and tools they need to provide excellent service for customers and prospects to close more deals. With your central corporate CRM database of customer information maintained on-premise, the powerful suite of built-in tools provided by Maximizer CRM are enabled on your desktops through wired or wireless network access, empowering your teams to:

- Work efficiently through the modern, intuitive interface
- Collaborate with colleagues and communicate effectively with customers
- Access and update customer and lead information, sales opportunities, customer service cases, marketing campaigns, documents, calendar appointments, tasks, and more
- Depend on wizard-driven dashboards for real-time insight into your business at a glance
- Configure, administer and update Maximizer CRM with ease
- Manage security and back-up your database through the desktop administration module
- Merge Maximizer held data directly in Microsoft Word®.

### Web access for real-time convenience online

Hosted on your company's secure server, Maximizer CRM web access provides the same functionality as the Windows desktop version, allowing you and your staff to access the same modules and tools through a standard web browser. There's no need to install software on each desktop.

- Empower your remote workforce and enable strategic collaboration with access to critical information by logging into a secure web interface, anywhere, anytime
- Provide full access to accounts, leads, sales opportunities, notes, custom fields, calendars, tasks, and customer

### Key Features:

- Account and contact management
- LinkedIn integration
- Time management iCalendar® integration
- Task management and automation
- Sales force automation & forecasting
- Marketing campaign automation & management
- Customer service management
- Microsoft Office® integration
- Outlook & Exchange synchronisation
- Business intelligence
- Workflow automation
- Partner relationship management
- Access options: mobile devices, Web, Windows desktop, remote synchronisation.



“With MaxMobile on my Blackberry, I have my hotlist tasks with me wherever I go.”

Paul Smulders, Trainer, Kenneth Smit Training

Mobile access:  
Work productively and effectively...  
anywhere, anytime, with  
intuitive and easy to use touch  
screens, optimised for the latest  
technology.



- service cases
- View personalised reports and dashboards for real-time insight into your business at a glance
  - Create marketing campaigns and access essential tools and company documents through the new, enhanced web access platform, now including full marketing campaign management, action plans and document library
  - Enjoy the same powerful features of CRM at the office including: Microsoft Word® integration with mail merge for creating personalised letters, personalised email templates for standard professional communications, and Excel export of customer and sales data
  - Automatically merge Maximizer entries when sending a Word document to print
  - Save Word documents merged with Maximizer entries to customers timeline and documents library
  - Use the same user interface as the desktop software, enjoying a continuous and familiar CRM experience
  - Manage appointments, tasks and a series of standard processes with action plans to organise projects and systematically schedule follow-up activities
  - Maintain strategic thinking with sales opportunity management and reports
  - Deploy web access with ease by customising the .NET framework- to make it work for your organisation,

- including custom windows and tabs
- Integrate with your corporate intranet, including internal documents and policies, plus external links to give users quick access to other critical information
- Integration with Microsoft Outlook - Save emails to customer Service case, no need to duplicate email note and saved.

### Mobile CRM for on-the-fly response

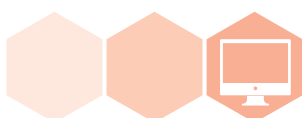
Whether you're in sales, on a field service team, or a frequent-flyer executive, Maximizer Mobile CRM<sup>1</sup> keeps you on top of the critical customer and prospect information essential to your success. Mobile devices, including BlackBerry®, Windows Mobile®, iPhone®, iPad®, Palm® and other popular smart phones and tablets have become critical tools to compete effectively. Now, with Maximizer on your mobile device, you can go beyond reading and reacting to email and be proactive about managing your customers and winning more deals. Leverage the power of CRM with the convenience of mobility to build customer relationships, boost productivity, collaborate with colleagues and provide real-time updates for forecasting and planning — anytime, anywhere.

- Get the edge on your competitors to win more deals
- Skip the logon page, with automatic logon to access Maximizer more quickly via mobile devices

- Respond regardless of time or location to engage prospects, build customer loyalty and close more deals
- Get real-time online access to the entire Maximizer CRM database content
- View address book entry contact information in appointment email/ remainders, with integration to Google Maps® for directions
- Monitor the status of your business and team performance at a glance, with real-time dashboards and reports and make timely decisions to drive revenue
- Track each customer's history, including conversations, transactions and service cases to deliver value, build loyalty and increase repeat business
- Search by case number in customer service screen
- Make real-time updates from the field on lead status and qualification, forecasted revenue and sales opportunity details
- Minimise administration work back at the office and stay on top of follow-up activities while on the road
- Prepare for your next meeting or call with a complete view of the customer's information — including activity, account status and financial history
- Enable collaboration among team members on the road to set up multi-user appointments, assign tasks, update opportunities, and escalate service cases<sup>2</sup>
- Elevate the level of communications and information kept on record with

1. Maximizer Mobile CRM is included with Maximizer CRM All Access Licenses. Functionality and offerings vary across smartphone devices. Contact Maximizer Software for details. For a complete list of supported devices, visit [www.max.co.uk](http://www.max.co.uk).

2. This feature is available only with MaxMobile for Blackberry® which is included with each Maximizer CRM All Access license. MaxMobile for Blackberry® supports Blackberry® 7000, 8000, 9000 series, including Curve®, Pearl®, Bold®, Storm® and Tour®. Check [www.max.co.uk](http://www.max.co.uk) for system requirements and supported devices.



Mobile dashboards:  
Get real time data insights  
wherever, whenever.



- video, voice and image capture and storage in Maximizer CRM<sup>2</sup>
- Plan your optimal day of appointments and activities by mapping multiple customers to your BlackBerry® GPS to get turn-by-turn directions<sup>2,3</sup>
- Tap into valuable corporate resources through the Company Library to send NDAs, brochures, quotes and other documents to customers and prospects
- Conduct timely follow-ups and keep deals moving, with access to updated details of sales opportunities
- Maximise customer satisfaction by resolving and updating service cases in the field
- Empower IT administrators to get your mobile workforce up and running quickly, with easy deployment of MaxMobile for BlackBerry® to field staff through wireless push and single-click installation.

## Remote synchronisation for Windows desktop offline

Keep your team up-to-date with MaxExchange, the data synchronisation option that provides offline Windows Desktop access for staff working in remote or home offices. Maintain productivity off-premise with full-featured CRM capabilities.

- Access all the same data, modules, and processes remotely as Windows Desktop users in the office — using the same software, offline

2. This feature is available only with MaxMobile for BlackBerry® which is included with each Maximizer CRM All Access license. MaxMobile for BlackBerry® supports BlackBerry® 7000, 8000, 9000 series, including Curve®, Pearl®, Bold®, Storm® and Tour®. Check [www.max.co.uk](http://www.max.co.uk) for system requirements and supported devices.

- Distribute opportunities and action items to remote team members
- Maximise offline productivity by storing a copy of records locally and synchronising the latest updates back and forth seamlessly, and regularly, with the central database
- Secured synchronisation using 128-bit encryption and tracks transfer status so you don't have to worry about data theft or loss
- Focus on the tasks at hand with reliable automatic or scheduled synchronisation, or synchronise with the click of a button over the Internet via FTP, using a WAN connection, or over your email system
- Synchronise information quickly by filtering records by owner and documents by age and size to reduce file transfer size
- Optionally, remote staff can leverage the power of the web and use Maximizer CRM web access for real-time online access, as described above.

## Supported devices and browsers

Maximizer Mobile CRM offers several options for today's mobile devices and smartphones, including MaxMobile for BlackBerry®, MaxMobile for Windows Mobile®, wireless web access for iPhone®, HTC, Google Android® and Nokia® and MaxLink for Palm®.

iPhone® and iPad® and smartphones and tablets from HTC, Google Android, Nokia and more...

3. For BlackBerry® devices running BlackBerry® OS 4.2.1 to 4.6, only BlackBerry® Map is supported. Driving directions are not available. For BlackBerry® devices running BlackBerry® 4.7 and later only, option to display multiple addresses, as well as driving direction "Get Directions" between two locations is supported.

- Mobile access for Maximizer CRM allows you to view and update critical customer information in your Maximizer CRM database in real-time, through your iPhone's wireless web browser. Expand the capabilities of your iPhone smartphone with Mobile CRM and turn yours into a valuable business tool when you're on the road
- Real-time access and updates to your Maximizer CRM contacts, tasks, calendar, sales opportunities and customer service cases on-the-fly through your mobile smartphone's wireless web browser
- Monitor key business KPIs in real-time from any location with Mobile Dashboards and take immediate action
- One-click access to maps and directions from customer records
- No synchronisation, local data or extra software to install on your device
- Wireless access is included when you purchase Maximizer CRM.

## BlackBerry® Smartphones and Playbook

- Mobilise your sales force by adding your Maximizer CRM records directly onto the latest BlackBerry® and Windows Mobile® smartphones with Max Mobile<sup>4</sup>. Empower field sales and service staff to update notes, look-up accounts and leads, access the latest customer service cases, and update their sales forecast - all while they're on the road, with real-time synchronisation back to the Maximizer CRM database in the office
- Upload your contacts and

4. MaxMobile for BlackBerry®, Windows Mobile®, Pocket PC and Windows Mobile® smartphone add-on product. Additional fees apply. MaxMobile requires at least one Windows desktop, web access or dual access license. IIS server required.

“When on the road, my sales team can access information recorded by the offices and respond instantly to an issue or opportunity”

Steve Davison, Managing Director, Minus 40

leads (including custom fields), appointments, tasks, notes, sales opportunities and service cases onto your smartphone by synchronising with your Maximizer CRM database

- Access and update customer records on-the-fly, with automatic or manual synchronisation with your Maximizer CRM database
- Create new contacts, opportunities and cases in MaxMobile from BlackBerry emails, address book entries and phone records
- Log incoming and outbound calls to and from your smartphone to client records
- Access records in your corporate CRM database that have not been synchronised and store on your smartphone with Maximizer CRM wireless web access<sup>5</sup>, for real-time access through your smartphone's web browser
- One-click access to maps and directions from customer records
- Access the online document library to send brochures, quotes and other documents to customers and prospects on-the-fly from your smartphone
- Supports wireless<sup>6</sup> or wired (USB) synchronisation.

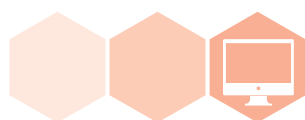
Visit our website for a list of all supported wireless devices and internet browsers.

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5. Required Maximizer CRM wireless web access, which is included with a MaxMobile license, web access or dual access license.

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6. MaxMobile wireless synchronisation server is required for wireless synchronisation. Blackberry Enterprise Service is not required but will work in conjunction with MaxMobile wireless synchronisation server.





## About Maximizer Software

Maximizer Software delivers Customer Relationship Management (CRM) software and professional services to meet the needs, budgets and access requirements of entrepreneurs, small and medium businesses and divisions of large enterprises.

Simple, easy to use and affordable, Maximizer CRM enables companies to mobilise their workforces through all-access web, smart phone, tablet and desktop delivery methods.

Easily configurable for organisations in any industry, Maximizer CRM optimises sales processes, enhances marketing initiatives and improves customer service to ultimately boost productivity and revenue.

With headquarters in Canada and offices and business partners worldwide, Maximizer Software has sold over one million licenses to more than 120,000 customers since 1987.

### Technology Partners



### Maximizer CRM

Maximizer CRM helps small and medium-sized businesses maximize their marketing, sales, customer satisfaction capabilities and enhance their productivity and efficiency through the optimisation of what resources they have.

### Why Maximizer CRM?

- Simple & quick to deploy, use and maintain
- Flexible access options through web, desktop and mobile devices
- Value for money with low total cost of ownership and monthly subscription models
- Expertise as a leader in pioneering CRM development, with more than 20 years experience.

### Visit [www.max.co.uk](http://www.max.co.uk) for:

- A test drive of the latest release
- Information on how CRM can support your role
- Tools and eBooks
- Resources and information on Cloud based CRM
- An overview of technology and features
- Online demos and features
- White papers and webinars on CRM best practices.

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