



Access Options

“We wouldn’t have been able to develop our field force without Maximizer CRM and its remote access capabilities. In order to have functional field reps, we needed a way for them to report in, provide updates and get information from us. Maximizer CRM gave us a way to work live remotely.”

Andrew Knowles, Assistant Sales Manager
StemCell Technologies Inc



Work when and where you want

With today’s customer demands for near real-time response and workforces being more mobile and remote than ever, there’s a rapidly growing need for flexible work options and access to critical customer information. Maximizer CRM provides these options by extending its desktop capabilities to Maximizer Mobile CRMⁱ for BlackBerry®, Windows Mobile®, iPhone® and other devices, as well as to Web Accessⁱⁱ.

Whether you’re working from home, in a remote office, or on the road, Maximizer CRM delivers reliable customer and prospect insights when and where it’s most needed.

Maximizer Mobile CRM for on-the-fly response

The days of being chained to the office or lugging a laptop around are a thing of the past. Armed solely with Maximizer Mobile CRM on the mobile device of your choice, you’ll have the access and capacity to build customer relationships, boost productivity, collaborate with colleagues and provide real-time updates for forecasting and planning — anytime, anywhere. Maximizer Mobile CRM options are:

- Use MaxMobile to access and update complete customer profiles, leads, opportunities, appointments, service cases, and notes — stored directly on your BlackBerry or Windows Mobile device for speed and efficiency, with wireless synchronizationⁱⁱⁱ back to the office
- Use Wireless Web Access^{iv} for seamless real-time online access to your entire corporate CRM database through a wireless web browser on virtually any device, including iPhone™, to work with records not directly stored on your device
- Use MaxLink^v to synchronise Palm smartphones to Maximizer CRM with one click to the HotSync button

Comprehensive and intuitive CRM for Windows Desktop

Maximizer CRM installed on your Windows desktops provides your customer-facing staff at the office with critical information and tools essential to winning deals and servicing customers. With the central corporate database of customer information maintained on-premise, the valuable features of Maximizer CRM are enabled on your desktops through corporate wired or wireless network access empowering your teams to: collaborate with colleagues, administer and use with ease, and quickly synchronise and access.

- Enable staff to access up-to-date customer and lead information, sales opportunities, customer service cases, marketing campaigns, documents calendar, tasks, and more
- Provide multiple administrators with access to manage security, back-up your database, and manage users through the desktop administration module
- With a simple, intuitive interface, Maximizer CRM boasts a familiar user experience across all access options
- Enable web, remote, and mobile access to the same valuable data for the staff when they’re on the road or working from home

Web Access for real-time convenience

Maximizer CRM’s Web Access option provides the same user-friendly interface as the desktop version to ensure a seamless and familiar experience. Get access to the same modules as with Windows desktop access — all through a standard web browser, without requiring the installation of software.

Maximizer CRM 10⁵ 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 synchronisation
- Accounting integration
- Business Intelligence
- Workflow automation
- Partner relationship management
- eBusiness
- Access options: mobile devices, web, Windows desktop

Technology Partners



Certified Solution Provider



- Empower your remote workforce and enable strategic collaboration with access to critical information — no matter where they are with full access to customers, notes, custom fields, leads, calendars, tasks, sales opportunities, customer service cases, and company documents
- Enjoy many of 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
- Manage appointments, tasks and series of standard processes with Action Plans to organise projects and systematically schedule follow-up activities
- Maintain strategic thinking with opportunity management and access to reports and dashboards for real-time business visibility
- Deploy with ease by customizing .NET framework based Web Access view to make it work for your organisation, including custom windows and tabs

Take your customer relationships offsite with Remote Synchronisation

Keep your team up-to-date with MaxExchange, the data synchronisation option that provides offline Maximizer CRM access to remote staff. Maintain productivity off-premise with full-featured CRM information and capabilities.

- Remote staff has easy and complete access to all the same data, modules, and processes as Windows desktop users in the office — using the same software, offline
- Distribute opportunities and action items to remote team members
- Maximize offline productivity by storing a copy of records locally and synchronising the latest updates back and forth seamlessly and regularly with the central database
- Rely on 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 synchronization, or sync with the click of a button over the Internet via FTP, using a WAN connection, or over your email system
- Quickly synchronise information by filtering records by owner and documents by age and size to reduce file transfer size

- i. Maximizer Mobile CRM requires Maximizer CRM licenses, server, and MaxMobile licenses. MaxMobile for BlackBerry and Windows Mobile is an add-on product with additional fees. For a complete list of supported devices, visit <http://www.max.co.uk/crm-support/supported-products.html>
- ii. Web Access, formerly called Employee Portal in earlier versions, is available at additional fees.
- iii. Wireless Synchronisation requires MaxMobile Synchronization Server (additional license fees apply)
- iv. Wireless Web Access option has additional fees. It is included when you purchase either Web Access or MaxMobile.
- v. MaxLink for Palm OS devices is available as a free add-on and synchronises Maximizer CRM with existing modules on your Palm and requires no extra software to be installed on the device.

Why Maximizer CRM 10.5

1. **Simple** and quick to deploy, learn, use and maintain.
2. **Access** to critical information through mobile devices, the web and Windows desktop options.
3. **Best value** in its class for full-featured CRM.
4. **Expertise** of 120,000 customers over 20 years, and over 1 million licenses sold

Visit www.max.co.uk for:

- Information based on your role: sales, marketing, service, executive, IT
- Information on CRM and Contact Management
- An overview of features and technology
- Online demos and free trial software
- White papers and webinars on CRM best practices

Maximizer CRM helps small and medium-sized businesses maximize sales, customer satisfaction and profitability through increased business productivity and optimisation of limited resources.

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