



# Microsoft® plus Maximizer for Seamless CRM



Works with:

- Windows Mobile®
- Office®
- Outlook®
- Exchange®
- Windows XP and Vista
- SQL Server®
- Internet Explorer®
- Virtual Earth™ and Live Search
- Dynamics® GP

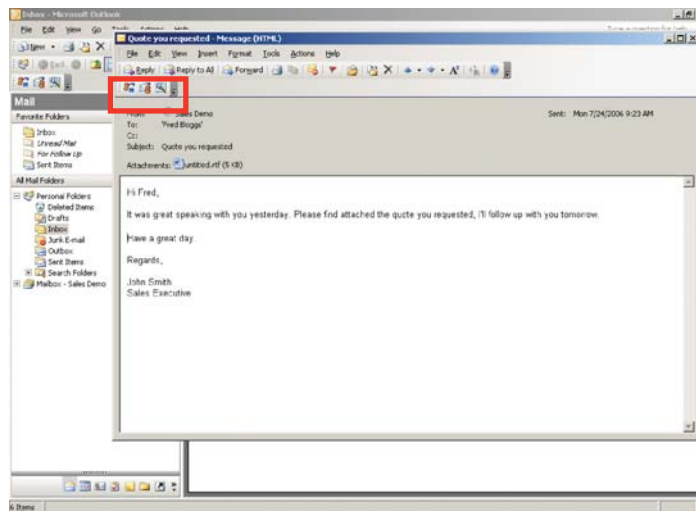
## Leverage the power of Maximizer CRM on a Microsoft® foundation

Small to medium-sized businesses with a Microsoft® technology foundation can leverage the strength of the familiar Microsoft® backbone and applications integrated with Maximizer™ CRM. Built for Windows and Windows Mobile operating system, and leveraging the .NET framework and SQL database, Maximizer CRM provides a centralised customer management solution that is also integrated with the Microsoft applications you already use in your business, such as Outlook®, Office® and back-end programs such as Dynamics® GP accounting software.

As a Microsoft Gold Certified Partner, Maximizer Software collaborates with and receives support from Microsoft to stay on the leading edge of innovation in order to provide the most effective CRM for small and medium-sized businesses on the Microsoft platform.

### Maximize email efficiency with seamless Outlook integration

Providing a gateway between Outlook and your customer records, Maximizer CRM enables your team to work efficiently and collaborate in a familiar environment. Relevant customer and partner email communications are easily saved to Maximizer CRM, ensuring that a record is maintained of the entire customer history, for quick access at anytime by others.



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

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

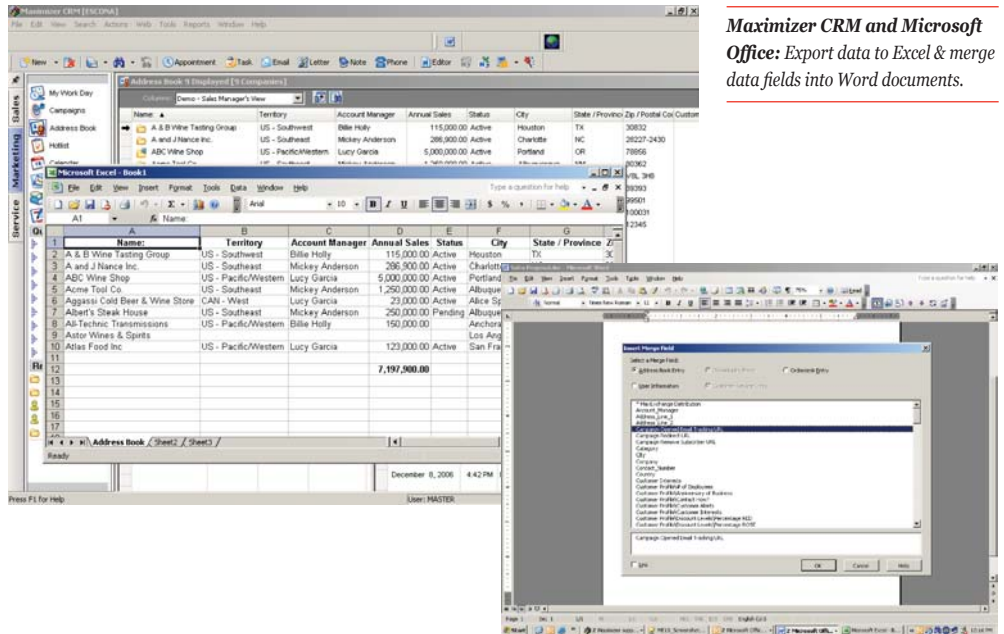
Lora Gernon, Director, Partner Sales Group  
Microsoft Canada

- Share critical communications company-wide while avoiding email overload. Provide staff with access to relevant emails sent and received through Outlook by instantly saving them to customer records — no cutting and pasting required.
- Synchronise contacts between Outlook and Maximizer CRM with one click, 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 your Maximizer & Outlook address books for distribution of emails.

- With two-way synchronisation 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 synchronisation, mobile workers can access contacts and appointments through handheld smartphone devices.

## Optimise productivity with integrated Office applications

Use Maximizer CRM with the Office tools your staff is already familiar with and maximize productivity through easy integration of customer data into spreadsheets and documents.



**Maximizer CRM and Microsoft Office:** Export data to Excel & merge data fields into Word documents.

- Merge data fields into Word® documents to personalise letters, proposals, contracts and other correspondence, then save them as templates or into a customer record.
- Apply flexible layout and formatting with Word to print and fax campaigns.
- Use FrontPage® to create vibrant HTML email campaign content.
- Instantly export data and reports to Excel®, analyzing and sharing it within this familiar Microsoft interface.
- Save any Office document directly into customer records to preserve the evolution of proposals, quotes and other communications.
- Store files in the central Maximizer CRM company library for staff to send to prospects and customers.



*Access Maximizer CRM anywhere, anytime on your Windows Mobile device.*

## Harmonise accounting and CRM data through one interface with Dynamics GP

Gain a holistic view of your customers, enabling you and your staff to better service their accounts. Your staff will save time, working more efficiently by accessing information through one easy-to-use interface when you use Maximizer CRM with Microsoft Dynamics GP.

- Integration with Microsoft Dynamics GP, included out-of-the-box with Maximizer CRM Accounting Link<sup>®</sup>, provides a 360° customer view that pulls transactions, invoices, quotes and purchase orders directly into Maximizer CRM.
- View credit limit, balance, and overdue accounts at a glance, saving time and better serving customers.
- Create invoices and estimates directly within Maximizer CRM, save them in Dynamics GP, and send them to the customer.
- Maximizer CRM pulls product list items, prices and important client financial details from Dynamics GP.
- Match and link Maximizer CRM customer records to your 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 Customisation Suite.

## Synchronise Maximizer Mobile CRM and Web Access powered by Microsoft

With Windows Mobile<sup>®</sup> and Internet Explorer, collaborate with colleagues anywhere, anytime that suits your schedule and your customers.

- For mobile staff, synchronise contacts and schedules to mobile devices with MaxMobile for Windows Mobile Pocket PC and Smartphone devices, or use Internet Explorer Mobile for real-time functionality through Maximizer CRM Wireless Web Access.
- Access Maximizer CRM 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.
- 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 Entrepreneur or Group Editions) 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 SQL Reporting Services to help you turn your customer data into meaningful business information that enables informed decisions.

## 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<sup>®</sup> desktop.

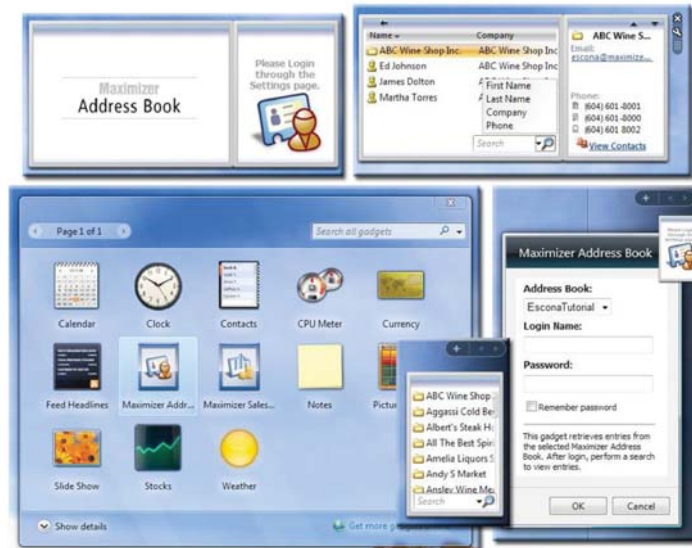
## Maximizer CRM 10.5 Features

- 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, remote synchronisation

### Technology Partners



### Certified Solution Provider



**Maximizer CRM Access from your Desktop:** With Vista gadgets, access contacts, leads, and your sales dashboard with 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.
- Customise easily with support for direct, native SQL updates — industry-standard coding for your IT staff.
- Customisation 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.

i. Accounting Link for use with Dynamics GP is an add-on product with additional license fees

### 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

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

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

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**Maximizer Software**  
Simply Successful CRM