

# On Demand CRM for Today's Mobile Workforce

Work when and where you want

## Key Benefits

- Visualise crucial performance metrics at a glance to optimise your business
- Make effective, timely decisions based on rapid analysis of relevant information
- Empower managers with the ability to easily identify problem areas
- Spend less time reporting, more time managing

*"We wouldn't have been able to develop our field force without Maximizer Enterprise and its remote synchronisation 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 Enterprise gave us a way to work live remotely."*

*- Andrew Knowles,  
Assistant Sales Manager,  
StemCell Technologies Inc.*

Today's workforce is truly mobile. People work from home, at the office and on the road. Maximizer Enterprise™ gives your workforce on demand access to critical customer information from anywhere. Whether you are working using a remote desktop or laptop, or accessing Maximizer Enterprise through the Internet, or on a wireless handheld device, the information and functionality you rely on will be there'.

## Get on the Same Page with Remote Synchronisation

Collaborate with everyone on your team and stay up to date while working remotely by synchronising your remote Maximizer Enterprise CRM users with the main database using MaxExchange.

## How MaxExchange Works

Because remote workers use a copy of Maximizer Enterprise on their local computer, they regularly synchronise with the central database to keep all the information up-to-date. Conversely, as others enter new information into the central database, remote workers synchronise to receive the latest information.

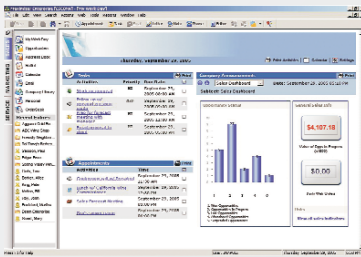
- As soon as a remote worker starts their workstation (or at pre-scheduled times) MaxExchange automatically sends any changes to the central database and receives new, updated information back.

## Get the Right Information to the Right People

- Distribute information relating to specific opportunities to the appropriate team members. Keep track of time zones to determine which changes took place first, in case of conflict, so you always have the most up-to-date information.
- Let remote users synchronise data seamlessly with user profiles and simplified criteria for filtering records.
- Build a web-services based application to administer MaxExchange remotely.

## Reduce Downtime

- Seamless, one-button synchronisation allows mobile workers to easily stay up to date, and even pause and resume at any time.
- Save time by synchronising only the data that has changed instead of over writing every record every time.
- Enjoy the benefits of powerful data compression and integrity checking features.
- Specify whether to send Notes, Documents, Knowledge Base Articles and Company Library documents to a remote user based on the age and size to reduce the amount of information you need to synchronise.



**On Demand Web Access: Get real-time CRM information, including the Executive Dashboard and reports, through a web browser – no software to install!**

*“Having customer information available at our fingertips, whether it be through a laptop computer or a BlackBerry device, provides our people with the information they need exactly when they need it. The BlackBerry interface with Maximizer Enterprise works flawlessly giving us immediate access when we are out in the field to our important customer data.”*

**- Faron G. Thompson, Managing Director,  
Income Property Finance Division,  
Primary Capital Advisors**

## Ensure Reliability & Security

- MaxExchange detects out-of-sequence and lost data packets, then automatically generates email alerts to the system administrator and requests a resend in order to maintain data integrity and completeness.
- MaxExchange keeps track of processing status so it can recover from possible server shut downs or lost connections, and start up at the exact point where it left off.
- While synchronising, information is secured using 128-bit encryption so you don't have to worry about data theft.

## Choose the Way You Sync

- Share a networked database or work remotely with a copy of the database.
- Synchronise information over the Internet via FTP, using a WAN connection, or over your existing email system.

## Easy to Use. Easy to Run

- To enhance productivity, keep MaxExchange running in the background with automatic servicing, communicate with the server automatically at pre-scheduled times, or manually synchronise.
- Reports from the server help administrators see data transfer information such as server configurations, site numbers, and transport mechanisms so that you can easily uncover and resolve potential connection failures.
- With Maximizer Enterprise Workflow Automation, configure MaxExchange to send automatic real-time alerts via email or pager when data connections fail. Or send your sales manager an email alert when a remote sales representative hasn't synchronised in several days.

## Provide Anywhere Access with the Web-Based Employee Portal

The web-based Employee Portal presents the same user interface as the desktop software, so the user experience is continuous and familiar.

- Log-in from anywhere to access the CRM database and carry out your typical daily tasks using a Microsoft® Internet Explorer® web browser. The secure portal is based on the Microsoft .NET framework for user authentication, secure database access and session management.
- Check and update appointments and tasks; search and update customer records and opportunities in your pipeline; send emails, view outstanding customer support cases, and resolve incidents online; use different views to tailor to your needs.
- Collaborate to make sales by implementing strategy-based opportunity management.
- Use the Activities Tab to review tasks and appointments for an associated customer, lead, sales opportunity or customer service case..

## Customise for Your Organisation

- Based on the .NET framework, you can easily customise the Employee Portal to make it work for your organisation, including custom windows and tabs.
- Brand your Employee Portal with your corporate logo. Integrate it with your corporate intranet, including internal documents and policies, plus external links to give users quick access to information related to your company and industry.

## Visualise Key Performance Indicators

- Gain greater visibility into your customers and business by enabling managers to access reports wherever they are. The Employee Portal enables access to more reports through the web-based Reporter, powered by Crystal Reports®.
- Sales, marketing and customer service managers can view and print graphical real-time status reports of 30 and 60-day funnels, forecasts by quarter, pipeline by sales team, and more.
- With the Executive Dashboard, executives can instantly visualise which areas are doing well and which areas need attention.

- ✓ See a high-level snapshot of real-time information on the company's performance in a single view so you don't have to flip through pages of reports.
- ✓ See the status and value of the sales pipeline, number of abandoned deals, status of marketing campaigns or other critical business indicators.
- ✓ Even set-up alarms to be notified when an indicator reaches a critical level.

## Take it to the Street with Handheld, Mobile Solutions

Access customer information, take notes at meetings, or check your task list and schedule whether you're at a client location or in transit. Whether employees are using Windows Mobile®, Palm® or a web-enabled BlackBerry® device, Maximizer Enterprise has solutions to keep your staff productive—wherever they are.

### For Windows Mobile® Device Users: MaxMobile<sup>1</sup>

Use the latest Windows Mobile PDAs with Maximizer Enterprise to take your customer information on the road. Update with the latest details, take notes and synchronise it back to the corporate database.

- MaxMobile installs directly on your Windows Mobile device and synchronises back to the modules in Maximizer Enterprise for contacts and leads (including user-defined fields), appointments, tasks, and notes. Everything you need to manage your customers and your schedule.
- View and update customer information while on the road, follow-up on your leads, and make notes to synchronise back to the corporate database.
- Check your schedule and make follow-up tasks for yourself to call back on important clients.
- Define a pre-set list of contacts, tasks and appointments you want to synchronise. Updating is as simple as a click of a button.
- Accurate two-way synchronisation ensures that information on both your PDA and the corporate database is always the most current.

### For Palm® Device Users: MaxLink<sup>2</sup>

With MaxLink, synchronise the information from Maximizer Enterprise with your Palm OS device.

Update contact information and take notes while at client meetings and synchronise it back at the office.

- MaxLink automatically matches the information in your Maximizer Enterprise Address Book, Calendar, Hotlist, Notes, Journal and User-Defined Fields with the modules already on your Palm device: Phone List, Date Book, To Do's, Memo Pad and four custom fields. No extra software to install on your PDA.
- Just press the HotSync® button on your Palm device to synchronise critical data.
- Accurate two-way synchronisation ensures that information on both your PDA and your corporate database is always the most current.
- Synchronise only the information you need without compromising your personal data.
- Synchronise multiple Address Books directly from Maximizer Enterprise and select which modules to synchronise.
- Specify the date range for transferring so you can synchronise data from a specific time.

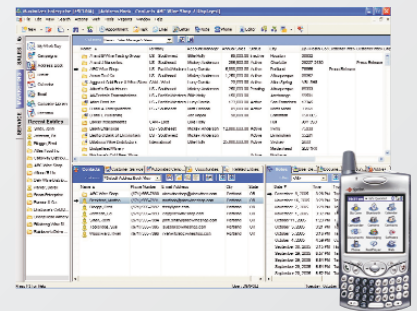
### For Wireless Web Device Users: Wireless Portal<sup>2</sup>

Get real-time information while you're on the move without having to synchronise or install extra software on your handheld device so you're always up-to-date.

- Access CRM information using the web browser on your BlackBerry®, Palm®, Treo, or Windows™ Mobile® device.
- Retrieve your customers and leads to get critical contact information while you're on the road, including all the associated profile information and notes.
- Remain productive by sending emails and saving them to customer records.
- Add notes from meetings directly associated with the contact record so you don't forget any of the important details that were discussed.
- Access your day's calendar and tasks to ensure you're following up on leads and meeting deadlines, then create follow-up appointments and tasks for yourself right on the spot.
- Access your sales opportunities to stay focused on deals in your pipeline that are ready to close, and update the forecast notes and fields.



**For Windows Mobile Device Users:**  
Synchronise your customer information back and forth with your Windows Mobile device



**For Palm® Users:** Synchronise your customer information to your Palm device to take information on the go – no extra software to install on your Palm!

**For Wireless Web Users:**  
Access CRM information in real-time through the wireless browser on your BlackBerry, Treo, or Windows Mobile device.



<sup>1</sup>Web-based Employee Portal & Wireless Portal available only in eCRM Suite. MaxMobile for Windows Mobile PDAs requires additional licenses.

<sup>2</sup>For a list of supported handheld devices for any of these 3 solutions, see [www.maximizer.com/support/products.html](http://www.maximizer.com/support/products.html)

For system requirements of various access options, see [www.maximizer.com/solutions/maxent/system.html](http://www.maximizer.com/solutions/maxent/system.html)



## 9 Reasons that make Maximizer Enterprise Better.

- Award-winning, intuitive, integrated sales, marketing, customer service & support CRM software
- Adaptable to your business demands
- On demand access: Desktop, PDA & Web-Ready
- Rapid deployment & results
- Works with Office, Outlook, and accounting programs
- Bullet-proof security
- Architecture built on industry standards
- Affordable: Lowest total cost of ownership in its class
- Proven with over 7,500 customers and over 10 years focused on customer management software

## For More Information

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### Maximizer Enterprise 9.5

Designed for small and medium-sized businesses, Maximizer Enterprise 9.5 rapidly helps companies gain strategic insights and implement winning strategies that will outperform competitors. This proven, affordable CRM solution gives sales, marketing and service professionals the tools they need to attract prospects, win new customers and increase repeat business.

### About Maximizer Software

Maximizer Software has helped over 7,500 Maximizer Enterprise customers and more than one million Maximizer users grow their businesses by building profitable customer relationships with award-winning solutions.

### Maximizer Enterprise works with technology from the following partners



### Awards



Authorised Maximizer Partner

## Maximizer

The CRM Company [www.max.co.uk](http://www.max.co.uk)

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