



# 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 CRM<sup>i</sup> for BlackBerry®, Windows Mobile®, iPhone®, Nokia®, HTC Google G1™ and other devices, as well as to Web Access<sup>ii</sup>.

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. Empower IT administrators to get your mobile workforce up and running quickly, with easy deployment of MaxMobile to the field with wireless push<sup>iii</sup> — even when they are out of the office. 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 synchronization<sup>iv</sup> back to the office
- Use Wireless Web Access<sup>v</sup> for seamless real-time online access to dashboards<sup>iii</sup> and your entire corporate CRM database through a wireless web browser on virtually any device, including iPhone, HTC Google G1 and Nokia (Symbian OS) smartphones
- Use MaxLink<sup>vi</sup> to synchronize 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 synchronize 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.

- 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

## 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 synchronization
- Accounting integration
- Business Intelligence
- Workflow automation
- Partner relationship management
- eBusiness
- Access options: mobile devices, web, Windows desktop

### Technology Partners



### Certified Solution Provider



- Enjoy many of the same powerful features of CRM at the office including: Microsoft® Word integration with mail merge for creating personalized letters, personalized 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 organize 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 organization, including custom windows and tabs

### Take your customer relationships offsite with Remote Synchronization

Keep your team up-to-date with MaxExchange, the data synchronization 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 synchronizing the latest updates back and forth seamlessly and regularly with the central database
- Rely on secured synchronization 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 synchronize information by filtering records by owner and documents by age and size to reduce file transfer size

- 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.maximizer.com/support/products/handheld.html>*
- Web Access, formerly called Employee Portal in earlier versions, is available at additional fees.*
- Included with Maximizer CRM 10.5 Freedom release.*
- Wireless Synchronization requires MaxMobile Synchronization Server (additional license fees apply)*
- Wireless Web Access option has additional fees. It is included when you purchase either Web Access or MaxMobile.*
- MaxLink for Palm OS devices is available as a free add-on and synchronizes 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.

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

#### Visit [www.maximizer.com](http://www.maximizer.com) 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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