

# Account & Contact Management



*“For the money, I can’t imagine a set of products that could have better supported our business through the growth we’ve experienced.”*

Kevin Timmerman, President  
Steele Capital Management

## ***Engage Prospects. Delight Customers. Increase Revenue.***

With today’s competitive business environment and uncertain economy, organizations need the edge that will make them effectively stand out in the marketplace. Exceed your customers’ expectations and proactively reach out to prospects by improving the way you manage your accounts, schedule your work day and follow up on every sales opportunity and customer.

Built for small to medium-sized businesses and divisions of large enterprises, Maximizer CRM enables you to centralize customer information across sales, marketing and customer service, improving efficiency and productivity so you can focus on the most important part of your business — your customers.

### **Seek and Create Opportunities**

#### ***Account and Contact Management***

Centralizing all customer information and processes into one holistic view across your organization enables customer-facing employees to make quick, informed decisions on everything from up-selling opportunities to target marketing strategies, and effective problem resolution. Maintaining updated, comprehensive information on all your key customers and prospects allows you to capitalize on priority opportunities rather than waiting for them to call you.

- Manage unlimited contacts, profiled with your choice of custom fields, such as industry, size, and other fields suited to your business’ way of tracking customers
- Access complete history and 360-degree view of customer interactions and activity including emails, calls, product purchases and deal-critical indicators including which email marketing campaigns they’ve received and recent service tickets created
- Easily customize your view of contact information with key fields and personalized columns
- Link with your phone for caller ID pop-up and direct dialing to increase call accuracy, save time, and track time spent on calls
- Maintain data integrity through duplicate recording checking and mandatory fields
- Track organizational hierarchy of your customer contacts in an easy-to-see chart
- Search contacts on any field and create one-click links to frequently accessed lists of customers or prospects
- Get maps and driving directions using built-in Microsoft Virtual Earth for virtually any location in the world
- Make informed calls to customers and prospects by viewing emails sent and received through Microsoft Outlook® integration

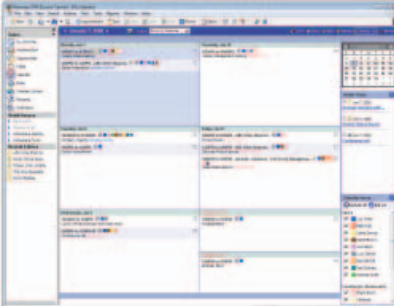
- Close deals seamlessly by quickly checking credit limits and instantly creating quotes with Accounting Link<sup>i</sup> integration with Microsoft Dynamics™ GP<sup>ii</sup>, Intuit QuickBooks®<sup>iii</sup> and other leading programs
- Stay on top of customer financial history by viewing balances, invoices and order limits

## Optimize efficiency and productivity

### *Time Management*

With the integrated calendar, effectively manage your schedule and collaborate seamlessly with co-workers to maximize productivity and profitability.

- View upcoming appointments and prioritized activities at a glance
- Schedule appointments with multiple contacts — colleagues, customers and prospects — using the color-coded, multi-user calendar
- Track all your appointments and tasks with each client to see a quick activity history at a glance
- Choose daily, weekly or monthly views, and print schedules to your day-timer
- Receive automatic reminders of deadlines and appointments
- Synchronize your calendar with Outlook or your mobile device to stay on top of appointments
- Track and report on time spent by product or service to monitor performance
- Set flexible work hours to suit your daily schedule
- Collaborate seamlessly with your team with shared calendars

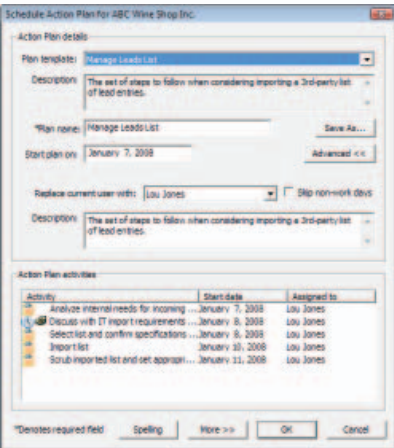


## Effectively manage your team to get things done

### *Task Management and Action Plans*

Ensuring timely completion of projects, sales activities and lead follow-up requires more than prioritizing your own daily tasks. Often, the activities of other team members are critical to achieving success. Action Plans and Tasks help you manage a series of tasks for yourself or across other individuals and departments — to guarantee that deliverables and follow-up activities are completed on schedule.

- Prioritize your action items and view account or lead information directly from the task window
- Delegate and collaborate by assigning deadline-driven tasks to yourself or your colleagues
- Schedule follow up activities such as next calls, proposals or follow-up emails
- Automatically alert the right people to unpursued leads for follow-up
- Prioritize tasks by displaying in optimal view, such as sorting by zip code or state to systematically call by time zone
- Synchronize task list with Outlook or your mobile device to ensure that nothing gets missed on the road
- Print your daily task list to your day-timer
- Receive timely prompts about task deadlines
- Automate everyday tasks and stay on top of priority opportunities using Workflow Automation



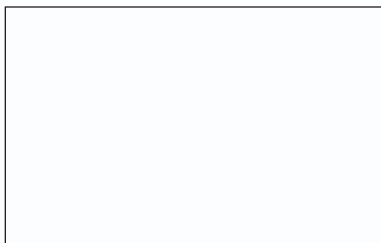
# Maximizer CRM 10.5 Features

- 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, remote synchronization

## Technology Partners



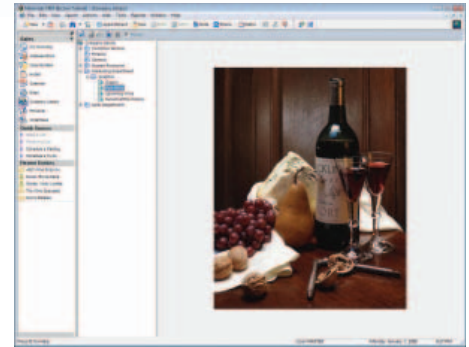
## Certified Solution Provider



## Foster customer loyalty by consolidating communications

### Email and Communications Management

Profitable relationships start with solid knowledge of your customers and prospects. Provide added value, strengthen loyalty and increase repeat business with access to complete customer history, and integrated communications with email and letter templates for consistent, professional communications.



- With Outlook integration, view related records, save emails, and create new contacts and cases in Maximizer directly from Outlook
- Preview all email messages within the email window, then save important incoming and outgoing email to the matching contact record
- Export and import contacts between Maximizer and Outlook with ease
- Compose emails in text and HTML formats, access Outlook contacts, and manage signatures
- Maintain consistency across all communications with letter, email, quote and fax templates in Maximizer's Editor or Microsoft Word®
- Email multiple documents and collateral to customers directly from the Company Library document repository

- Accounting Link is an add-on product with additional license fees.
- Accounting Link is supported for Microsoft Dynamics GP 9.0.
- Accounting Link designed for use with QuickBooks is supported for 2008 Pro/Premier Editions and Enterprise Edition 8.0.

### 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.

### 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

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

**Call: 1-800-804-6299**

**Email: [sales@maximizer.com](mailto:sales@maximizer.com)**

**Web: [www.maximizer.com](http://www.maximizer.com)**

#### Americas

604-601-8000 phone  
604-601-8001 fax  
[info@maximizer.com](mailto:info@maximizer.com)  
[www.maximizer.com](http://www.maximizer.com)

#### Europe, Middle East, Africa

+44 (0) 1344 766900 phone  
+44 (0) 1344 766901 fax  
[info@maximizer.co.uk](mailto:info@maximizer.co.uk)  
[www.maximizer.co.uk](http://www.maximizer.co.uk)

#### Australia, New Zealand

+61 (0) 2 9957 2011 phone  
+61 (0) 2 9957 2711 fax  
[info@maximizer.com.au](mailto:info@maximizer.com.au)  
[www.maximizer.com.au](http://www.maximizer.com.au)

#### Asia

+(852) 2598 2888 phone  
+(852) 2598 2000 fax  
[info@maximizer.com.hk](mailto:info@maximizer.com.hk)  
[www.maximizer.com.hk](http://www.maximizer.com.hk)